

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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### SECTION 1

#### ADMINISTRATION

#### PRIMARY NUMBERS

1 0 0 - 4 9 9

Section 1 covers records relating to general administrative functions and activities of B.C. government ministries and agencies. This includes records relating to: ministry/agency organization, planning and performance, committee and staff meetings, legislation development, agreement negotiation and management, strategic planning, conference and event organization, records and forms management, information access and privacy protection, library services, intellectual property protection, risk and security management, and disaster and emergency response planning.

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### SECTION 1

100 - ADMINISTRATION - 499

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[Key to ARCS/ORCS Codes and Acronyms](#)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
100	<u>ADMINISTRATION - GENERAL</u>			
	Records not shown elsewhere in the administration section which relate generally to general administrative functions and activities of B.C. government ministries and agencies.			
	Record types include appointment books, calendars, diaries, meeting room booking records, and convenience copies of correspondence.			
	NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.			
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	SO	nil	DE
	- OPR	SO	nil	DE
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	DE = These records can be destroyed upon authorization of the Records Officer because significant policies and procedures are retained by the government archives in the records of central agencies.			
-01	General			
-05	Lists, spreadsheets, and registers (covers approval tracking, staff responsibility lists, project tracking logs, indexes, and other lists used to keep track of information that is documented elsewhere in the office recordkeeping system)	SO	nil	DE
	NOTE: Do not use this secondary for lists, spreadsheets and registers that are covered by a specific secondary in ARCS or the relevant ORCS.			
-20	Correspondence convenience copies (since 1980/01) (also known as "day files" and "chronological files")	3m	nil	DE
	NOTE: These records consist of copies of correspondence created since 1 January 1980 that are arranged in chronological order for administrative convenience. Classify the official file copy on the appropriate ARCS or ORCS secondary.			

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[Key to ARCS/ORCS Codes and Acronyms](#)

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100	<u>ADMINISTRATION - GENERAL</u> (continued)			
-25	Correspondence convenience copies (pre-1980/01) (also known as “day files” and “chronological files”)	NA	NA	SR
	NA = Active and semi-active retention periods have elapsed for records created prior to 1 January 1980.			
	SR = The government archives will selectively retain convenience copies of correspondence created before 1 January 1980. A government archivist will select convenience copies of correspondence that provide evidence of government programs for which the government archives lacks sufficient documentation in its holdings.			
-30	Appointment and meeting scheduling records (includes appointment books, calendars, diaries, meeting room booking records, and other planners)	SO	nil	DE
	NOTE: Apply the Executive Records schedule (102906) to executive (e.g., minister, deputy minister, and assistant deputy minister or equivalent) appointment and meeting scheduling records. Set aside executive appointment books, calendars, and other planners regularly for transfer to the government archives (print electronic versions and box with other SR records or transfer via the government EDRMS).			

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### 102      ADMINISTRATION - STAFF MEETINGS

Records relating to ministry/agency staff meetings, including internal management-level meetings.

Record types include correspondence, agendas, minutes, and reports.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-20      Staff meetings

CY+2y

nil

DE

DE = Staff meeting records can be destroyed upon authorization of the Records Officer because information concerning significant agenda items are included in ministry/agency executive committee meetings, which are selectively retained by the government archives under the Executive Records schedule (102906).

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### 105      ADMINISTRATION - MINISTRY/AGENCY ORGANIZATION

Records relating to the organization, reorganization, roles and responsibilities of ministries and agencies, including their subordinate units (e.g., divisions, branches, departments, districts, and regions).

Record types include correspondence, reports, and organization charts.

For goal-setting, objectives, and performance, see primary 400.

For projects, see secondary 400-40.

For staffing projections and planning, see primary 1580.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Organization charts and organization histories		SO	nil	FR

OPR = office responsible for creating the ministry's or agency's organization charts and organization histories

NOTE: All other offices may either apply the non-OPR retention period to these records, or classify them under secondary -20.

-20	Ministry/agency organization files (covers organization, reorganization, administrative history, regionalization, consolidation and responsibilities of ministries and agencies, including divisions, branches, regions, and offices)		SO	nil	DE
-----	--	--	----	-----	----

SO = when organization and/or responsibilities change, and when no longer required for reference purposes

DE = These records can be destroyed upon authorization of the Records Officer because information concerning significant ministry and agency organization is retained by the government archives under secondary -02.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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			<u>A</u>	<u>SA</u>	<u>FD</u>
110	<u>EQUIPMENT-RELATED ACCIDENT/INCIDENT INVESTIGATIONS</u>				
	Records relating to the investigation of equipment, motor vehicle, and watercraft-related accidents and/or incidents, but not workers' compensation claims and investigations.				
	Record types include correspondence and reports.				
	For equipment accident and incident information, see the appropriate equipment history file in Section 3, Equipment and Supplies.				
	For insurance claims management, see primary 450.				
	For property damage incidents, see primary 470.				
	For workers' compensation claims and investigations, see primary 1560.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Equipment-related accident/incident investigations		SO+1y	2y	DE
	SO = upon completion of investigation				
	3y = The retention period is based on the two-year limitation period for commencing an action arising from property damage or personal injury under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3), plus one year for the service of documents.				



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## 125      LEGISLATION - GENERAL

Records relating to legislation not shown elsewhere in this primary block. This primary covers draft and approved legislation not administered by the ministry or agency receiving and classifying the information. It also includes orders in council (OICs) for board appointments.

Record types include correspondence, legislation, reports, and studies.

For the development of legislation for which a ministry or agency is directly responsible, see primary 140.

For legislative matters, including proceedings of the House, see primary 355.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-03      Comparative studies      SO      nil      DE

SO =    upon completion or abandonment of study, and when no longer required for reference purposes

-04      OICs for board appointments      SO+1y      nil      DE

SO =    when the appointee has vacated the position

NOTE: OICs for board appointments are fully retained from the *Co-ordination of Agencies, Boards and Commissions ORCS* (schedule 118365).

-20	B.C. government legislation and regulations (covers draft and approved legislation not administered by the ministry or agency receiving and classifying the information; as well as OICs, OIC resumes, and general information relating to OICs)	SO	nil	DE
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SO =    when no longer required for reference purposes

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[Key to ARCS/ORCS Codes and Acronyms](#)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
125	<u>LEGISLATION - GENERAL</u> (continued)			
-35	B.C. local government bylaws (covers municipal, regional district, improvement district, and school board bylaws)	SO	nil	DE
	SO = when no longer required for reference purposes			
	NOTE: For researching and proposing changes to local government bylaws, see the relevant program <i>ORCS</i> .			
-40	Canadian provinces' and territories' legislation	SO	nil	DE
	SO = when no longer required for reference purposes			
-50	Federal legislation	SO	nil	DE
	SO = when no longer required for reference purposes			
	NOTE: For researching and proposing changes to federal legislation, see the relevant program <i>ORCS</i> .			
-60	First Nation-enacted legislation (covers band bylaws and self-government legislation enacted by specific First Nations' communities in other jurisdictions)	SO	nil	DE
	SO = when no longer required for reference purposes			
	NOTE: For researching and proposing changes to First Nation-enacted legislation, see the relevant program <i>ORCS</i> .			
-70	Foreign legislation	SO	nil	DE
	SO = when no longer required for reference purposes			

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### 140      LEGISLATION - MINISTRY/AGENCY

Records relating to legislation administered and developed by a ministry or agency. This includes the annual legislative program of ministries and agencies, as well as the development of legislation (i.e., acts) and subordinate legislation (e.g., regulations, orders in council [OICs], and orders made under the authority of an act that do not require the approval of the Lieutenant Governor in Council [e.g., ministerial orders]). It also includes a collection of approved legislation administered by ministries and agencies.

Record types include correspondence, working papers, requests for legislation, legislation, lists, indexes, and briefing notes and packages.

For Cabinet submissions, see primary 201.

For draft and approved legislation pertaining to other ministries or agencies, see primary 125.

For OICs for board appointments, see primary 125.

For researching and proposing changes to federal legislation, see the relevant program *ORCS*.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Legislative project status tracking (covers legislative project and decision registers, index, lists, and other tracking documents)		SO	nil	DE

SO = when updated and no longer required for reference purposes

NOTE: These records are used to track the progress and status of legislation projects, including legislative decisions for the current year.

-03	Legislative program		SO	nil	FR
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SO = upon conclusion of legislative session, and when no longer required for reference purposes

FR = The government archives will fully retain legislative program files because they document a ministry's legislative program for a given year.  
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140	<u>LEGISLATION - MINISTRY/AGENCY</u> (continued)			
-20	Legislation development case files (covers legislative proposals, requests for legislation, draft legislation, and other records of the development and revision of statutes)	SO	nil	DE
	SO = upon completion or abandonment of legislation project, and when no longer required for reference purposes			
	DE = Legislative development case files can be destroyed because the development process is sufficiently documented in records fully retained from Legislative Counsel under the <i>Legal Services ORCS</i> (secondary 34200-20 drafting of legislation case files), which document the process from requests for legislation, through the development stages and consultations with ministries and the cabinet.			
-50	Subordinate legislation development case files (covers the development and revision of regulations, OICs, ministerial orders, and other non-OIC orders such as emergency orders, which are made under the authority of a statute and do not require the approval of the Lieutenant Governor in Council)	SO	nil	DE
	SO = upon completion or abandonment of subordinate legislation project, and when no longer required for reference purposes			
	DE = Records covered by this secondary will be destroyed because they are sufficiently documented through full retention of completed subordinate legislation.			
	NOTE: Alternatively for administrative convenience, these records may be classified with the legislation development case files under secondary -20.			
-60	Approved ministry/agency-administered legislation (covers final, approved ministry/agency-administered legislation, regulations, and OICs)	SO	nil	FR
	SO = when no longer required for reference purposes			

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## 146      AGREEMENT NEGOTIATION AND MANAGEMENT

Records relating to the negotiation and management of agreements, including memoranda of understanding (MOUs), protocol agreements, and service level agreements (SLAs).

Records types include correspondence, agreements, forms, and reports.

NOTE: Records relating to agreements are considered administrative even though they often deal with operational matters. For ease of reference and retrieval, some offices may wish to physically arrange agreement files with the associated operational files. Another option is to file copies of such records on an operational file. Contact your records officer if you have any questions regarding file operations in your ministry or agency.

NOTE: Deposit original extra-provincial agreements with Order in Council (OIC) Administration, Ministry of Attorney General.

For audits relating to agreements, see primary 975.

For contracts, see primary 1070.

For employer-employee relations, see primary 1480.

For funding agreements, see primaries 950 and 1150.

For intra-ministry agreements (i.e., agreements between departments within ministries and agencies), see the relevant ARCS or ORCS secondary.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

SO      7y      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

CY+2y      nil      DE

-02      Agreements register

SO      7y      DE

-20      Agreement development files

SO      7y      DE

(covers draft agreements relating to all types of third parties, i.e.: federal, foreign, improvement district, inter-agency, inter-ministry, inter-provincial, multi-party, municipal, regional district, school district, and other local governments)

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[Key to ARCS/ORCS Codes and Acronyms](#)

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### 146      AGREEMENT NEGOTIATION AND MANAGEMENT (continued)

SO = when agreement is approved or negotiations are suspended

DE = Agreement development files can be destroyed upon authorization of the Records Officer because significant decisions are documented in briefing notes and other executive records.

NOTE: This secondary covers negotiations, studies, draft agreements, and all other records involved in the development of the agreement.

-25	Approved extra-provincial agreements (i.e., OIC'd) (covers approved foreign agreements, approved federal agreements, and approved inter-provincial agreements)	SO	7y	DE
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SO = upon expiry or termination of the agreement, and if applicable, upon completion of audit

DE = Approved extra-provincial agreements can be destroyed upon authorization of the Records Officer because original agreements are deposited with OIC Administration, Ministry of Attorney General.

NOTE: Extra-provincial agreements are between the B.C. government and jurisdictions outside British Columbia (e.g., the federal government, other provinces and territories, and foreign countries).

NOTE: This secondary covers final, signed agreements and records documenting the monitoring and management of the agreement.

-45	Approved internal and local agreement files (i.e., not OIC'd) (covers approved agreements relating to improvement districts, inter-agency, inter-ministry, multi-party, municipal, regional districts, school districts, and other local governments)	SO	7y	SR
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SO = upon expiry or termination of the agreement, and if applicable, upon completion of audit

SR = The government archives will selectively retain approved internal and local agreement files that document significant decisions and arrangements.

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### 146      AGREEMENT NEGOTIATION AND MANAGEMENT (continued)

NOTE: This secondary covers internal agreements between ministries and agencies within the B.C. government (e.g., service level agreements), as well as external agreements with B.C. local governments and private/public sector organizations located in British Columbia.

NOTE: This secondary covers final, signed agreements and records documenting the monitoring and management of the agreement.

7y =    The seven-year retention period is consistent with the retention period for contracts (primary 1070) and funding agreements (primaries 950 and 1150). It is based on the six-year limitation period for commencing an action with respect to a contract under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

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			<u>A</u>	<u>SA</u>	<u>FD</u>
155	<u>APPRECIATION, COMPLAINTS, INVITATIONS</u>				
	Records relating to general complaints, invitations, and expressions of appreciation, congratulation, sympathy, and regret. This primary also covers investigations conducted by the Office of the Ombudsperson.				
	Records types include correspondence and reports.				
	For general inquiries, see primary 320.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:	CY+2y	nil	DE	
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>	
	-00 Policy and procedures - OPR	SO	nil	DE	
	-01 General - <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>	
	-04 Acknowledgements and regrets (covers letters of appreciation/thanks, condolences and apologies, and letters of congratulation)	SO	nil	DE	
	-05 Complaints or criticism	SO	nil	DE	
	SO = upon resolution, and no longer required for reference purposes				
	NOTE: Classify records relating to the monitoring of specific cases under secondary -30.				
	-08 Invitations and greetings (covers greetings, messages, cards, invitations, and letters of introduction)	SO	nil	DE	
PIB	-20 Ombudsperson's investigations	SO	2y	FR	
	SO = upon completion of investigation				
	FR = The government archives will fully retain one copy of each Ombudsperson's investigation because they document significant interaction between the government and the public, and how disputes about government actions arise and are resolved.				
PIB	-30 Complaint case files	SO+1y	nil	DE	
	SO = upon resolution of complaint				

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160	<u>ASSOCIATION, CLUB, SOCIETY VOLUNTARY PARTICIPATION</u>			
	Records relating to voluntary participation and/or membership in associations, clubs, societies, and equivalent organizations, but not boards, councils, or commissions.			
	Records types include correspondence and reports.			
	For boards, councils, or commissions, see primary 200.			
	For mandated or legislated relationships with associations and societies, see the relevant program <i>ORCS</i> .			
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	SO	nil	DE
	- OPR	SO	nil	DE
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-20	Associations, clubs, societies - since 1997	SO	nil	DE
	SO = when association, club or society is no longer active and/or files have been closed for one year			
	DE = Upon authorization of the Records Officers, the ministry or agency will destroy association, club, and society files opened on or after 1 January 1997 at the end of their active retention period.			
	NOTE: After 1 January 1997, records relating to a mandated or legislated relationship between the ministry/agency and an association, club, or society must be classified in the relevant program <i>ORCS</i> .			
-25	Associations, clubs, societies - pre-1997	SO	nil	SR
	SO = when no longer needed for reference purposes			

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160      ASSOCIATION, CLUB, SOCIETY VOLUNTARY PARTICIPATION  
(continued)

SR = The government archives will selectively retain association, club, and society files opened before 1 January 1997 because they often document operational functions of the government ministry or agency and the interaction between government and non-government organizations regarding these operational functions.

The government archives will retain those files that document a significant mandated or legislated relationship between the ministry and an association, club, or society.

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### 182      BADGES, EMBLEMS, AND OTHER VISUAL IDENTIFIERS

Records relating to ministry/agency badges, emblems, and other visual identifiers and symbols (e.g., insignia, coats of arms, crests, pennants, and flags).

Records types include correspondence, drawings, standards, policies, and manuals.

For intellectual property, see primary 345.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-20      Ministry/agency visual identity files  
(covers badges, emblems, crests, flags, pennants, and other visual identity program documentation)

SO+1y

nil

SR

SO =    upon design completion or abandonment, and when no longer required for reference purposes

SR =    The government archives will selectively retain ministry/agency visual identity files that document original designs and specimen types.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 188      CHARITABLE CAMPAIGNS

Records relating to ministry/agency charitable fundraising activities and charitable payroll deduction campaigns (e.g., United Way and Provincial Employee Community Services Fund [PECSF]).

Records types include correspondence, reports, forms, and gaming event licences.

For sponsorships, see primary 220.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-20      Charitable campaign files

FY+1y

6y

DE

(covers savings bond payroll purchase campaigns, Provincial Employees Community Services Fund, and campaigns relating to other specific charities and causes, such as blood donor clinics and, United Way Campaigns)

7y =      The retention period satisfies the longest retention period (i.e., five years) required by the provincial gaming enforcement branch for the retention of gaming event licences and supporting records, and is consistent with the retention period for related financial records classified under section 4 *Financial Management*.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 195      CIRCULAR, DIRECTIVE, AND MANUAL DEVELOPMENT

Records relating to the development of ministry/agency circulars, bulletins, directives, and administrative manuals.

This primary also covers circulars, directives, orders, and manuals received from central and external agencies that directly relate to the administrative function of the receiving office.

Records types include correspondence, circular letters, bulletins, directives, instructions, orders, and manuals.

For operational manuals, see the *ORCS* of the relevant program.  
For technical and equipment operating and user manuals, see primary 700.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Cabinet directives		SO+1y	2y	SR

-20	Internal circulars, bulletins, and directives		SO	nil	DE
-----	---	--	----	-----	----

-25	Administrative manuals (covers the development of the manual, as well as the "original" or "official file copy" of the manual)		SO	2y	DE
-----	---	--	----	----	----

SO = upon manual completion or abandonment, and when no longer required for reference purposes

-30	Pre-2009 operational manuals - final (covers "original" or "official file copy" of pre-2009 operational manuals that were classified under former secondary 195-30 Ministry operational manuals)		SO	2y	SR
-----	---	--	----	----	----

NOTE: Classify operational manuals since 2009 in the *ORCS* of the relevant program.

-35	Pre-2009 operational manual development files (covers pre-2009 development files that were classified under former secondary 195-35 Development files for ministry operational manuals) (continued on next page)		SO	2y	DE
-----	--	--	----	----	----

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
195	<u>CIRCULAR, DIRECTIVE, AND MANUAL DEVELOPMENT</u> (continued)			
	SO = upon manual completion or abandonment, and when no longer required for reference purposes			
	NOTE: Classify operational manual development files since 2009 in the <i>ORCS</i> of the relevant program.			
-40	External (to B.C. government) circulars/directives (covers "original" or "official file copy" of circulars, bulletins, directives, and other notices received from other governments and agencies)	SO	nil	DE
	SO = when information is updated			
-45	B.C. central agency circulars/directives/manuals (covers circulars, bulletins, directives, manuals, and other notices received from B.C. government central agencies, e.g., instructions and forms for preparation of orders in council and Treasury Board submissions, accommodation manual, Queen's Printer information bulletins, Comptroller General instructions, and taxation bulletins)	SO	nil	DE

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 200      COMMITTEES - GENERAL

Records relating to the establishment, organization, and functions of committees not shown elsewhere in this primary block. This includes all similar groups (e.g., boards, commissions, councils, panels, sub-committees, task forces, and working groups).

Records types include correspondence, notices, agendas, minutes, reports, and handouts.

For associations, clubs, and societies, see primary 160.

For reporting boards, agencies, and Crown corporations, see primary 282.

Unless otherwise specified below, the ministry or agency OPR (office or branch responsible for the records of the committee) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

-20      Committee files

(covers general, inter-ministerial, international, and inter-provincial/federal committees)

SO      7y      SR

SO = when committee is no longer active and/or file/volume has been closed for one year

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 201      COMMITTEES - CABINET

Records relating to the establishment, organization, and functions of Cabinet committees and related deputy ministers' committees. This primary also includes ministry and agency submissions prepared for Cabinet or its committees, with the exception of Treasury Board.

Records types include correspondence, submissions, draft submissions, supporting documentation, notices, agendas, minutes, records of decision, reports, presentation handouts, and other types of records as indicated under relevant secondaries.

NOTE: The retention period in this primary takes precedence over those in the special schedule for executive records 102906.

NOTE: Cabinet Operations holds the master versions of Cabinet submissions. It is the policy of Cabinet Operations that ministry copies of Cabinet submissions and draft submissions are to be kept secure to ensure no unauthorized access. Substantial drafts should be kept locked in the deputy minister's or minister's office.

Requests from the public under the *Freedom of Information and Protection of Privacy Act* for information filed under this primary must be referred to your manager of information and privacy who will refer the request to Cabinet Operations.

For Cabinet directives, see secondary 195-02.

For deputy ministers' committees not related to Cabinet, see secondary 200-20.

For Treasury Board submissions, see primary 1250.

Unless otherwise specified below, the ministry or agency OPR (deputy minister's or minister's office) will retain these records for:

CY+3y      12y      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

FR

- non-OPR

SO

nil

DE

FR = Cabinet-related policy and procedures will be fully retained by the government archives because they document ministry/agency-specific policy, procedures, guidelines, and instructions regarding the Cabinet submission process. The records have significant evidential and informational value.

-01      General

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
201	<u>COMMITTEES - CABINET</u> (continued)			
-02	Cabinet submissions (from other ministries)	SO	nil	DE
-20	Cabinet committees	CY+3y	12y	DE
	DE = Upon authorization of the Records Officer, Cabinet committee records are eligible for destruction. Records of Cabinet committees are fully retained under the <i>Office of the Premier and Executive Council ORCS</i> (881099).			
-30	Deputy minister Cabinet-related committees	CY+3y	12y	SR
	SR = The government archives will selectively retain deputy minister Cabinet-related committee records because they document the provision of advice to Cabinet on major corporate issues. To assist in the selection process, ministries will identify if they are the chair of the committee when they transfer these records to offsite storage.			
-40	Ministry/agency cabinet submissions (includes final drafts of submissions, developmental drafts, correspondence, working papers, and other records leading to the preparation of cabinet submissions by the ministry or agency)	CY+3y	12y	FR
	FR = The government archives will fully retain Ministry/agency Cabinet submissions because they document the development of information that goes before Cabinet or its committees or that is incorporated into a Cabinet submission or used as the basis for developing a Cabinet submission. The records have significant evidential value.			
	15y = The retention period ensures that records of the deliberations of the Executive Council or its committees are retained by the ministry or agency until such time as the records no longer qualify as exceptions under the <i>Freedom of Information and Protection of Privacy Act (FOIPPA)</i> (RSBC 1996, c. 165, s. 12). The retention period takes precedence over those in the special schedule for executive records 102906.			

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 201      COMMITTEES - CABINET (continued)

FOI: In accordance with *FOIPPA*, the head of a public body must refuse to disclose to an applicant information that would reveal the substance of deliberations of the Executive Council or any of its committees until the information has been in existence for 15 or more years. This includes advice, recommendations, policy considerations, or draft legislation or regulations submitted or prepared for submission to the Executive Council or any of its committees.

NOTE: In the event of a change of government, the records of the previous Executive Council and its committees will be accepted by the central records management agency for semi-active storage immediately and retained with authorized access limitations for a combined total active and semi-active retention period of 15 years, at which time they will be ready for final disposition.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 220      CONFERENCES AND EVENTS

Records relating to ministry/agency participation in and/or sponsorship and organization of conferences and events (e.g., ceremonies, celebrations, exhibits, fairs, exhibitions, and public awards events).

Records types include correspondence, forms, brochures, posters, displays, photographs, films, sound recordings, and video, audio, and computer disks, tapes, and other storage media.

For associations, clubs, and societies, see primary 160.

For audio-visual and graphics material collected for future use in displays and exhibits, see primary 306.

For committees, see primary 200.

For employee awards and honours, see primary 1310.

For protocol-related records, see primary 415.

For training sessions, see primary 1735.

For visit and trip planning, see primary 490.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

-20      Conference and event files

CY+2y      nil      DE

(covers ceremonies, celebrations, conferences, seminars, symposia, public awards programs, and events involving educational institutions and, other organizations)

(includes distribution records, display documentation, public relations packages, and related documentation)

DE = Conference and event files can be destroyed because significant conference and event participation is covered in ministry *ORCS*, committee files and executive records.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 230      COOPERATION AND LIAISON

Records relating to routine cooperation and liaison between B.C. government ministries and agencies, and with other governments, governmental organizations, and institutions. This involves the exchange of information and general announcements and notifications.

Records types include correspondence and reports.

NOTE: Classify program-specific information under the appropriate *ARCS* or *ORCS* secondary.

For general inquiries, see primary 320.

For transitory records, see Transitory Information (schedule 102901).

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-20      Cooperation and liaison files

CY+2y

nil

DE

(covers cooperation with ministries, government institutions, Crown corporations, federal government departments, branches, and agencies, foreign countries, international governmental organizations, municipalities, regional districts, improvement districts, school districts, Aboriginal groups, and educational institutions)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 255      CORRESPONDENCE MANAGEMENT

Records relating to the control and tracking of correspondence. This includes the establishment of policies and guidelines on the format, terminology, and style of outgoing correspondence, as well as the referral and tracking of incoming correspondence.

Records types include correspondence.

For general incoming correspondence, see secondary 320-30.

For postal delivery logbooks, see secondary 375-06.

For program-specific correspondence, see the appropriate *ARCS* or *ORCS* secondary.

For reply letters for referred executive correspondence, see primary 280.

For signing authorities, see primary 265.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	nil	DE
		-non-OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

-20	Correspondence management files (covers correspondence guidelines, external standards, plain language, gender inclusive language, and correspondence projects)		SO+1y	nil	DE
-----	---	--	-------	-----	----

SO = upon project completion or cancellation, resolution of issue, or provision of information, whichever is relevant

PIB	-30	Correspondence tracking	CY+9y	nil	DE
-----	-----	-------------------------	-------	-----	----

10y = This is consistent with the retention period for executive briefing notes and correspondence referral replies, which are classified under primary 280.

NOTE: Secondary -30 covers the tracking of incoming correspondence that has been referred for a reply. It may also be used to track other types of records (e.g., briefing notes, Treasury Board submissions, and internal policies). Correspondence tracking systems include CLIFF.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 255      CORRESPONDENCE MANAGEMENT (continued)

NOTE: Classify the “official file copy” of tracked documents under the appropriate secondary (e.g., classify executive briefing notes and minister’s letters under secondaries 280-20 and -30 respectively).

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
265	<u>DELEGATION OF AUTHORITY</u>				
	Records relating to the delegation of authority, including financial signing authority.				
	Records types include correspondence, specimen signature cards, and expense authority matrices.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		FY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
	-00 Policy and procedures	- OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01 General				
PIB	-20 Delegation of authority authorization records (covers cancelled authorities temporary/time-dated authorities, signature sample cards, authorizations/matrices, and ministry internal authorizations for expenditures)		SO+1y	6y	DE
	SO = when the authority has expired or been superseded by new instructions				
	7y = The retention period is consistent with the retention period for related financial records classified under section 4 <i>Financial Management</i> .				

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 275 DISASTER/EMERGENCY RESPONSE PLANNING

Records relating to the continuation of ministry/agency operations in the event of a disaster or emergency.

Records types include correspondence, lists, plans, and reports.

For agreements, see primary 146.

For committees, see primary 200.

For computer system backup tapes or equivalent, see primary 6820.

For damage to buildings caused by vandalism or accidents, see primary 470.

For flood control projects, see primary 525.

For security, see primary 470.

For training, see primary 1735.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Emergency, disaster, and fire evacuation planning (covers emergency evacuation procedures, civil defence, disaster planning, disaster/emergency response contact lists, and fire evacuation planning)		SO	nil	DE

SO = when replaced by new procedures or plans

-25	Disaster/emergency incident case files (covers disaster/emergency incidents and fire report files)		SO+1y	5y	SR
-----	---	--	-------	----	----

SO = when no longer required for review and analysis

-30	Business continuity plans (covers disaster/emergency recovery plans and business continuity plans)		SO+1y	5y	DE
-----	---	--	-------	----	----

SO = when replaced by new plan



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 280 EXECUTIVE SERVICES - GENERAL

Records relating to the provision of various administrative services for the ministry executive (i.e., minister, deputy minister, assistant deputy ministers, and equivalent positions) by ministry non-executive offices. Those services include the preparation of replies for letters addressed to the executive, the preparation of executive briefing notes, and the management of issues of executive concern.

Records types include correspondence, reports, and briefing notes and equivalent briefing material (e.g., fact sheets) used to brief the ministry executive.

For correspondence convenience files, see primary 100.

For correspondence guidelines and tracking, see primary 255.

For form letter manuals, see primary 195.

For general ministry issues and inquiries, see primary 295.

For legislative matters, including house briefing notes, see primary 355.

For reporting boards, agencies, and Crown corporations, see primary 282.

For the retention of records maintained by the executive, see special schedule 102906.

Unless otherwise specified below, the ministry or agency OPR (designated non-executive offices) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01 General

-20 Executive briefing notes  
(also known as requests for decision)

CY+1y      9y      SR

-30 Executive correspondence referral replies  
(also known as minister's letters)  
(includes letters to the executive and reply letters)

CY+1y      9y      SR

NOTE: Classify the "official file copy" of briefing notes and minister's letters under secondaries -20 and -30 respectively. Copies may be classified on the relevant ARCS or ORCS secondary if they add to the accuracy, integrity, and completeness of that other file.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
280	<u>EXECUTIVE SERVICES - GENERAL</u> (continued)			
-40	Executive issues records	SO+1y	9y	SR
OPR = Designated non-executive offices are the OPR for the records classified under this primary. Executive offices must apply the Executive Records schedule (102906) to these records. All other offices must apply the non-OPR retention period and final disposition to these records.				
10y = The retention period is consistent with the retention period in the special schedule for executive records (102906).				

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 282      EXECUTIVE SERVICES - REPORTING BOARDS AND AGENCIES

Records relating to boards and agencies (including Crown corporations, tribunals, advisory boards, and school, university, college and hospital [SUCH] sector organizations) that report to a particular ministry and for which the minister answers in the Legislative Assembly.

Records types include correspondence and reports.

For legislative matters, including house briefing notes, see primary 355.

For the retention of records maintained by the executive, see special schedule 102906.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-20	Reporting board and agency files	SO	nil	DE
-----	----------------------------------	----	-----	----

SO = when no longer required

DE = These files can be destroyed upon authorization of the Records Officer because significant decisions regarding reporting boards and agencies are documented in records classified in primary 280 or in executive records under special schedule 102906.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 285      FORMS MANAGEMENT

Records relating to forms management, including forms analysis, design, and control. This primary includes the original artwork used in forms production, but does not include blank forms.

Records types include correspondence, forms, and reports.

For blank forms, see Transitory Information (schedule 102901).

For form purchase requisitions and orders, see primary 825.

For records management, see primaries 420 to 432.

Unless otherwise specified below, the ministry or agency OPR  
(                      ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below,  
all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

-02      Forms register

SO+1y      nil      DE

-20      Forms management files

(covers documentation of form design and history,  
functions, procurement, and distribution)

SO+1y      nil      DE

SO =    when a form is no longer used, or the information is no  
longer required

NOTE: Copies of forms which document or support  
administrative or operational functions should be  
retained on appropriate -00 policy and procedure files.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 290      INFORMATION AND PRIVACY - GENERAL

Records relating to freedom of information (FOI) and protection of privacy issues not shown elsewhere in this primary block. This primary includes Office of the Information and Privacy Commissioner (OIPC) investigations that are independent of the OIPC's review of records requests.

Records types include correspondence, reports, and other types of records as indicated under relevant secondaries.

NOTE: Refer to the *Freedom of Information and Protection of Privacy Act (FOIPPA)* (RSBC 1996, c. 165) and the *Recorded Information Management (RIM) Glossary* for definitions of terms used in this primary block.

For information security, see primary 470.

For OIPC or judicial reviews of records requests and related complaints, see secondaries 292-30 and 292-40.

For records management, see primaries 420 to 432.

Unless otherwise specified below, the ministry or agency OPR (information access office) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	FOI and personal information directories (covers freedom of information directory of records)		SO+1y	nil	DE
-04	FOI and privacy matters of other entities (covers documentation from other jurisdictions and other public bodies)		CY+1y	nil	DE
-20	Information/Privacy Commissioner investigations (includes correspondence, briefing notes, working notes, and investigation reports)		SO	5y	FR

SO = when not required for reference

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 290      INFORMATION AND PRIVACY - GENERAL (continued)

FR =    The government archives will fully retain Office of the Information and Privacy Commissioner (OIPC) investigations because they document significant issues, incidents and complaints regarding information and privacy programs.

NOTE: This secondary is intended for documentation relating to OIPC investigations for which the ministry or agency is directly responsible. Classify OIPC investigations of other public bodies under secondary -04.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 292      INFORMATION AND PRIVACY - FREEDOM OF INFORMATION

Records relating to the management of access to government information as stipulated in the *Freedom of Information and Protection of Privacy Act (FOIPPA)* (RSBC 1996, c. 165, part two), and subject to federal and other provincial freedom of information (FOI) legislation for responding to requests for consultation. This primary includes the review by the Office of the Information and Privacy Commissioner (OIPC) of a public body's decision regarding a request for records as regulated by *FOIPPA* (part five), as well as the identification of categories of records available to the public without application under *FOIPPA*.

Records types include correspondence; written requests for information and request forms; copies of retrieved records; staff time logs; notices of transfer, fees or extension of time; file lists, indexes or finding aids; reports; and other types of records as indicated under relevant secondaries.

For accounts payable, see primary 925.

For agreements, see primary 146.

For routine inquiries regarding services provided by a ministry or agency, see primary 320.

Unless otherwise specified below, the ministry or agency OPR (information access office) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures (may include copies of OIPC orders)	- OPR	SO	nil	DE
		-non-OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01	General				
-02	Request tracking		CY+1y	nil	DE

-05	<i>Public Record Index</i>		CY+1y	nil	DE
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-20	Public use records case files		SO+1y	nil	DE
-----	-------------------------------	--	-------	-----	----

SO = when not required for reference

NOTE: This secondary is intended for documentation about public use records. Public use records are those created or organized specifically with the expectation of public access.

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
292	<u>INFORMATION AND PRIVACY - FREEDOM OF INFORMATION</u> (continued)			
-25	<i>Public Record Index</i> case files	SO+1y	nil	DE
	SO = upon publication of the <i>Index</i>			
	NOTE: This secondary is used to collect information about categories of records available to the public without submitting a request for access as prescribed under <i>FOIPPA</i> (s. 71). The information in these files is used to update and maintain the <i>Public Record Index</i> .			
-27	Routine release review files (covers "reactive" and "proactive" release of information)	SO+1y	nil	DE
	SO = when records reviewed for routine release are no longer created and have been disposed of in accordance with the approved records retention and disposition schedule			
	NOTE: Routine release means the disclosure of certain types of information as a matter of course without the necessity of a formal Freedom of Information (FOI) request. Routine release includes (but is not limited to) the release of records that have been designated as available without a formal request under <i>FOIPPA</i> (s. 71). Routine release may be reactive (responding to requests for information when received) or proactive (systematically disseminating information in advance of requests using mechanisms such as the Internet or libraries).			
PIB	-30 FOI requests and related complaints (includes letter of acknowledgement, notice of extension, working notes, news clippings, summary of analysis, request response package including cover letter and copies of severed documents, mediation materials, and related commissioner and judicial recommendations and orders)	SO	5y	SR
	SO = when file is closed, all avenues of appeal are exhausted, and the information is no longer needed for reference			

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[Key to ARCS/ORCS Codes and Acronyms](#)



**ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM**

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A      SA      FD

292      INFORMATION AND PRIVACY - FREEDOM OF INFORMATION  
(continued)

SR = The government archives will retain FOI requests and related complaint files that document OIPC inquiries or judicial reviews. These records provide evidence of the way in which FOI requests are responded to throughout government. Creating offices will identify all other files covered by this secondary as being eligible for destruction at the end of the semi-active period; for physical files, this requires boxing those files separately.

PIB	-40	FOI requests for personal information (includes letter of acknowledgement, notice of extension, working notes, news clippings, summary of analysis, request response package including cover letter and copies of severed documents, request to correct personal information, and commissioner and judicial recommendations and orders)	SO	5y	SR
-----	-----	--	----	----	----

SO = when request is closed, all avenues of appeal are exhausted, and the information is no longer needed for reference

SR = The government archives will retain FOI requests for personal information that document OIPC inquiries or judicial reviews. These records provide evidence of the way in which FOI requests are responded to throughout government. Creating offices will identify all other files covered by this secondary as being eligible for destruction at the end of the semi-active period; for physical files, this requires boxing those files separately

	-45	FOI consultation requests (covers responses to requests for consultation from other public bodies and other jurisdictions within and outside of B.C.)	SO	5y	DE
--	-----	--	----	----	----

SO = when request is closed

	-50	Freedom of information issues (covers documentation of exceptions to disclosure, release of information, and other issues)	SO	5y	DE
--	-----	---	----	----	----

SO = when issue has been resolved, the information is no longer current, and/or the information is no longer required for reference purposes  
(continued on next page)

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

292      INFORMATION AND PRIVACY - FREEDOM OF INFORMATION  
(continued)

DE = Records classified under this secondary can be destroyed because freedom of information issues are sufficiently documented in executive records and policy documentation created by the Office of the Chief Information Officer under the *Information and Privacy ORCS*.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 293      INFORMATION AND PRIVACY - PROTECTION OF PRIVACY

Records relating to the collection, use, disclosure, and protection of personal information as regulated under section 26 to 34 of the *Freedom of Information and Protection of Privacy Act (FOIPPA)* (RSBC 1996, c. 165). This primary also relates to the identification and description of personal information banks, the correction of personal information, and the notification of correction of personal information. In addition this primary covers the development of privacy impact assessments as required under *FOIPPA* (s. 69[5]).

Records types include correspondence and reports.

For information security, see primary 470.

For information system documentation, see primary 6450.

For requests for information and related correction of personal information, see secondary 292-30 or 292-40.

Unless otherwise specified below, the ministry or agency OPR (information access office) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Release of personal information		CY+1y	nil	DE
-03	Use of personal information		CY+1y	nil	DE
-04	Correction of personal information		CY+1y	nil	DE
-05	Collection of personal information		CY+1y	nil	DE

PIB	-20	Personal information banks	SO	5y	DE
-----	-----	----------------------------	----	----	----

PIB	-30	Requests to correct personal information	SO	5y	DE
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SO = when personal information has been updated, annotated, or request has been transferred to another public body

NOTE: Classify requests to correct personal information resulting from FOI requests on the appropriate file under secondary 292-30 or 292-40.

-50	Protection of privacy issues	SO	5y	DE
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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

293      INFORMATION AND PRIVACY - PROTECTION OF PRIVACY  
(continued)

SO = when issue has been resolved, the information is no longer current, and/or the information is no longer required for reference purposes

DE = Records classified under this secondary can be destroyed because protection of privacy issues are sufficiently documented in executive records and central agency records under the *Information and Privacy ORCS*.

-60	Privacy impact assessments (also known as PIAs)	SO+1y	nil	DE
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SO = upon disposition of records covered by the PIA or completion of a new PIA

NOTE: Privacy impact assessments are conducted to determine if new legislation, systems, projects, or programs meet the requirements of part 3 of the *Act*. For related legislation, system, project, and program files see primaries 140, 6450, and 400 respectively.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
295	<u>COMMUNICATIONS - GENERAL</u>			
	Records relating to communications activities of ministries and agencies not shown elsewhere in this primary block.			
	Records types include correspondence, plans, news clippings, and reports.			
	For projects, see secondary 400-40.			
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	SO	nil	DE
	- OPR	SO	nil	DE
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-03	Communications plan	SO+1y	nil	SR
	SR = The government archives will selectively retain these records by retaining communication plans created before 3 July 2002 (the creation date of the Public Affairs Bureau).			
-04	News clippings	SO	nil	DE
-05	Staff biographical sketches or profiles	SO	nil	SR
	SO = when replaced by more current information or when individual leaves the ministry or agency			
	SR = The government archives will retain biographical sketches or profiles for senior staff, executive director and above.			
-06	Telephone/contact lists (covers media contact lists)	SO	nil	DE
-20	Current issues files (covers ministry current issues and projects and research issues)	CY+2y	nil	DE

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[Key to ARCS/ORCS Codes and Acronyms](#)

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

295 COMMUNICATIONS - GENERAL (continued)

DE = These records can be destroyed upon authorization of the Records Officer because significant issues are adequately documented in executive records covered by primary 280 and/or by special schedule 102906, and since July 2002 by the records of Government Communications and Public Engagement.

-30	Marketing and advertising files (covers advertising projects)	SO	2y	DE
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SO = upon project completion or cancellation, resolution of issue, or provision of information, whichever is relevant

NOTE: This secondary covers marketing and advertising records of agencies not served by the Government Communications and Public Engagement.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
306	<u>COMMUNICATIONS - AUDIO-VISUAL/GRAPHICS MANAGEMENT</u>				
	Records relating to the production of audio-visual aids (e.g. films and slide shows) and graphics (e.g., photographs, drawings, logos, and maps), as well as their collection for future use in presentations, displays, publications, and other forms of communication.				
	Records types include correspondence, films, photographic prints, negatives, slides, images, slide shows, and video and audio storage media.				
	NOTE: Classify audio-visual aids and graphics relating to a specific function on the appropriate <i>ARCS</i> or <i>ORCS</i> file.				
	For conferences and events, see primary 220.				
	For projects, see primary 400.				
	For publications and final versions of audio visual materials, see primary 312.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	<u>SO</u>	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Audio-visual and graphics management (covers motion pictures, slide shows, videotapes, audio-visual production project files, distribution records, display production, photographic prints, photographic negatives, indices, registers, and photographic slides)		SO	nil	DE
	SO = upon project completion or cancellation, resolution of issue, or provision of information (whichever is relevant), and when no longer required				
	DE = Audio-visual aids and graphics may be destroyed upon authorization of the Records Officer because significant material will be retained under secondary 312-05.				

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
308	<u>COMMUNICATIONS - PUBLICATIONS - GENERAL</u>			
	Records relating to ministry/agency-created publications not shown elsewhere in this primary block. This primary covers publication production, control, pricing, and distribution.			
	Records types include correspondence, forms, lists, and reports.			
	For accounts receivable, see primary 935. For copyright, see primary 345.			
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	SO	nil	DE
	- OPR	SO	nil	DE
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-07	Publication distribution lists and summaries (covers publication distribution summaries and distribution lists)	SO	nil	DE
	SO = when replaced by new list or summary, and when no longer required for reference purposes			
-20	Chargeable publication requests	FY+1y	6y	DE
	7y = The retention period is consistent with the retention period for related accounts receivable records.			
	NOTE: Alternatively for administrative convenience, chargeable publication requests may be classified with accounts receivable records under secondary 935-20.			
-30	Non-chargeable publication requests	SO	nil	DE
	SO = upon completion of request			
-40	Publication control and pricing files (covers request to commit funds [STOB40 planning], publication initiation forms, publication inventory, publication pricing, and ministry publication listing)	FY+2y	nil	DE

## [Key to ARCS/ORCS Codes and Acronyms](#)



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 312      COMMUNICATIONS - PUBLICATIONS - INDIVIDUAL

Records relating to the design and preparation of individual publications in various media by ministries and agencies.

Records types include correspondence, books, articles, manuscripts, directories, reports, pamphlets, newsletters and other periodicals, posters, maps, films, sound recordings, and video, audio, and computer disks, tapes, and other storage media.

For copyright, see primary 345.

For publication production and distribution, see primary 308.

For reference copies of publications, see secondary 358-20 and Transitory Information (schedule 102901).

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-02	Originals used for publication		SO+1y	5y	DE
-----	--------------------------------	--	-------	----	----

SO =    upon date of final publication

-05	Completed publications (not covered elsewhere)		SO+1y	5y	SR
-----	--	--	-------	----	----

SO =    upon date of final publication

NOTE: This secondary is reserved for one copy of the final, completed version of ministry/agency publications that are not classified in an *ORCS* or elsewhere in *ARCS*.

NOTE: The development of these publications is covered by secondary -20.

-20	Ministry/agency publication development files (covers articles, telephone directories, program directories, ministry publication development files, and publication review files)		SO+1y	5y	DE
-----	--	--	-------	----	----

SO =    upon date of publication or when publication development is cancelled

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 312      COMMUNICATIONS - PUBLICATIONS - INDIVIDUAL (continued)

DE = Ministry/agency publication development files can be destroyed upon authorization of the Records Officer because the final, completed versions will be retained by the government archives under secondary -05 or under appropriate *ORCS* secondaries.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
320	<u>COMMUNICATIONS - INQUIRIES</u>				
	Records relating to general inquiries from the public and other ministries, agencies, and organizations.				
	Records types include correspondence, notes, logs, reports, and other types of records as indicated under relevant secondaries.				
	For complaints, see primary 155.				
	For correspondence management, see primary 255.				
	For freedom of information requests, see primary 292.				
	For program-specific inquiries and correspondence, see the appropriate <i>ARCS</i> or <i>ORCS</i> secondary.				
	For Webmaster queries, see primary 340.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
	-00 Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01 General				
	-02 Inquiry logs and statistics		SO	nil	DE
	(covers statistical summaries of inquiries)				
PIB	-30 General inquiries		CY+1y	nil	DE
	(covers general incoming correspondence and responses and telephone conversation notes, including those to/from corporations, companies, and firms)				
	-40 Inquiry response management materials		SO	nil	DE
	(includes handbooks, guides, lists, and spreadsheets)				

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 324      COMMUNICATIONS - SPEECHES AND PRESENTATIONS

Records relating to ministry/agency staff speeches and presentations, including relevant speeches and presentations received from external government bodies and organizations.

Records types include correspondence, speaking notes, transcripts, handouts, and presentation slides.

For training session presentation material, see primary 1735.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Arrangements for speaking engagements				

-20	Minister's speeches (covers speeches relating to ministerial issues [not constituency matters] and minister's speech compilations)	SO	nil	DE
-----	---	----	-----	----

DE = These records can be destroyed upon authorization of the Records Officer because minister's speeches are retained by the Public Affairs Bureau.

-40	Staff speeches and presentations	SO	nil	SR
-----	----------------------------------	----	-----	----

SR = The government archives will retain speeches and presentations that provide significant documentation of research by government staff, and the history of government bodies or government decisions.

-45	Other speeches and presentations	SO	nil	DE
-----	----------------------------------	----	-----	----

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 330      COMMUNICATIONS - MEDIA RELATIONS

Records relating to information relevant to ministry/agency relations with the media.

Records types include correspondence, news releases, backgrounders, bulletins, advisories, public service announcements, and transcripts.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

-25      Media relations files

SO      nil      DE

(covers external media releases, contacts with media, individual and compilations of media release projects, news conferences, and radio and television interviews)

SO = upon project completion or cancellation, or provision of information, and when no longer required for reference purposes

DE = These records can be destroyed upon authorization of the Records Officer because media relations records are retained by the Public Affairs Bureau.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
338	<u>COMMUNICATIONS - POLLS AND SURVEYS</u>				
	Records relating to polls and surveys conducted by ministry and agency program areas (e.g., client satisfaction surveys and public opinion polls). This includes professionally-produced formal statistical surveys, as well as informal, internally-produced polls and surveys.				
	Records types include correspondence, forms, raw statistical data, and reports.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:	CY+2y	nil	DE	
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>	
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	nil <u>nil</u>	DE <u>DE</u>
-01	General				
-02	Final formal statistical survey summary reports		SO	nil	FR
	FR = The government archives will fully retain final formal statistical survey summary reports because they document significant polls and surveys undertaken by ministries and agencies. Draft and duplicate materials that hold no evidential value may be purged and discarded.				
-30	Polling and surveying records		SO	nil	DE
	SO = when summarized in a final report (if applicable), and no longer required for analysis or reference				
	DE = These records can be destroyed upon authorization of the Records Officer because significant information is retained by the government archives under secondary - 02.				

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 340      COMMUNICATIONS - WEB SITE MANAGEMENT

Records relating to developing and implementing ministry/agency web site plans and strategies, coordinating web site content, and ensuring the relevance, accuracy, and timeliness of web site information.

This primary also covers ministry/agency information presented on simple and dormant web sites not covered by an *ORCS*. Dormant web sites include abandoned web sites, web sites of defunct programs, and web sites of completed projects.

Records types include correspondence; HyperText markup Language (HTML), Standardized General Markup Language (SGML), and Extensible Markup Language (XML) electronic documents and paper print outs of these documents; electronic forms; research materials; site designs; briefing notes; press releases; implementation plans; reports; and other types of records as indicated under relevant secondaries.

NOTE: The retention and disposition of individual documents posted on the site should be carried out in accordance with the appropriate *ARCS* or *ORCS* secondary.

For computer hardware and software, see primary 737.

For forms registration, design and history, see primary 285.

For general inquiries, see primary 320.

For information presented on complex web sites, see the *ORCS* for the relevant program.

For security incidents and investigations, see primary 470.

For transitory records, see the Transitory Information (schedule 102901).

For web site copyright and ownership issues, see primary 345.

For web site technical development, see primary 6450.

For web site technical maintenance, see primary 6820.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Web site usage reports		SO	nil	DE

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

340      (continued on next page)  
COMMUNICATIONS - WEB SITE MANAGEMENT (continued)

-04      Web site e-mail queries      CY+1y      nil      DE  
            (includes webmaster and general website inquiries)

NOTE: This secondary covers miscellaneous queries from the public, non-government organizations, and government ministries and agencies regarding the web site and its pages. Classify inquiries regarding programs and services performed by the ministry or agency under primary 320 and/or ORCS for relevant program.

-20      Dormant web sites      SO      nil      SR  
            (covers abandoned web sites, web sites of completed projects, and web sites created by agencies that have become defunct)

SO = when web site is abandoned, project is completed, or agency becomes defunct

SR = The government archives will selectively retain significant dormant web sites and pages. They provide evidence of the way in which the government used Internet, Intranet and Extranet technology to manage projects and share information about its programs and services. They also provide evidence about the projects, programs and services.

Staff responsible for the program covered by the web site will notify the Records Officer when a web site becomes dormant. An archivist from the central agency will identify the significance of the dormant web site in consultation with the Records Officer and the program staff. All dormant web sites not selected for preservation will be destroyed.

Contact your Records Officer for additional information relating to the scheduling of web sites.

-30      Simple web site pages      SO      nil      DE  
            (covers simple ministry/agency web site pages, including simple "blogs" and simple "Wiki sites")  
            (includes HTML and wiki pages, ASCII text documents, on-line e-mail and search forms, sample data, PDF files, and image/graphic files)

SO = when the web site page is modified, altered, updated, or redesigned

[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

340      (continued on next page)  
COMMUNICATIONS - WEB SITE MANAGEMENT (continued)

NOTE: When not scheduled in the relevant program *ORCS*, this secondary covers the retention and disposition of ongoing simple web site pages as they are modified and revised. Simple web site pages are those that meet the following criteria:

- documents are static (e.g., reports, news releases, hours of operation, contacts, and descriptions of programs and services)  
or  
documents are frequently updated with non-substantive information (e.g., blogs and wikis)
- OPR version of the records are otherwise scheduled under primaries in *ARCS* or in the *ORCS* for the relevant program, and
- web site page does not link to or interact with a database

Secondary -30 does not cover dormant web sites classified under secondary -20.

-40	Web site management files (covers web site plans and strategies, web site content coordination, web page designs and templates, and web page posting approvals)	SO	nil	DE
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# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 345 INTELLECTUAL PROPERTY

Records relating to the protection of and permission to use intellectual property. Intellectual property refers to copyright, trade-marks, patents, and industrial designs.

Record types include correspondence, forms, applications, certificates of registration, and assignments of copyright and waivers of moral rights agreed to in service contract negotiations.

For contracts, see primary 1070.

For intellectual property licence agreements, see primary 146.

For the procurement and issue of special items, see primary 847.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-02 Copyright permission requests

-20	Industrial design registration files	SO	10y	DE
-----	--------------------------------------	----	-----	----

SO = when registered by the federal government

10y = Industrial design registration lasts 10 years.

NOTE: Industrial designs protect the original shape, pattern, ornamentation or configuration of a finished manufactured article. They must be registered to be protected.

-30	Trade-mark registration files	SO	15y	DE
-----	-------------------------------	----	-----	----

SO = when registered by the federal government

15y = Trade-mark registration lasts 15 years.

NOTE: Trade-marks are used to distinguish the goods and services of one person or entity from another. They are used for slogans, names or titles of products, distinctive packages, and unique product shapes.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
345	<u>INTELLECTUAL PROPERTY</u> (continued)			
-35	Official mark registration files	SO+2y	nil	DE
	SO = when registered by the federal government			
	2y = Official mark registration files are retained for two years because the information is permanently listed in the federal government's trade-mark registry.			
	NOTE: Official marks, which are protected under the <i>Trade-Marks Act</i> [RSC 1985, c. T-13, c. 9(1)(n)(iii)], may be registered only by public authorities. They last forever unless the authority withdraws them.			
-40	Patent registration files	SO	20y	DE
	SO = when registered by the federal government			
	20y = Patents last 20 years.			
	NOTE: Patents are obtained only by registration. They protect inventions (e.g., processes, equipment, and manufacturing techniques).			
-50	Copyright files	SO+1y	50y	DE
	SO = upon publication or if applicable, when copyright has been registered by the federal government			
	51y = Copyright for published works created or published by the Crown lasts for the remainder of the calendar year in which the work is published, plus 50 years after that. If the record has never been published it is protected until publication plus 50 years.			
	NOTE: Copyright is automatic when an original literary, dramatic, musical, and artistic work is created. The Province seldom registers it. Therefore this secondary should be used for records that prove Crown copyright on works in which there might be a dispute over ownership.			

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
350	<u>LEGAL MATTERS</u>				
	Records relating to ministry/agency legal advice, opinions, decisions, challenges, and issues.				
	Records types include correspondence, legal opinions, subpoenas, affidavits, oaths, judicial decisions, and registers.				
	NOTE: For ease of reference and retrieval, some offices may wish to file copies of relevant records (e.g., legal advice and opinions) on the appropriate administrative or operational file. Contact your Records Officer if you have questions regarding file operations in your ministry or agency.				
	For employee oaths of employment, see the records of the B.C. Public Service Agency.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Legal document register (covers legal opinions register)		SO+1y	nil	SR
	SO = when updated and no longer required for reference purposes				
-03	Subpoenas		SO+1y	nil	DE
	SO = when no longer required to protect the legal interests, rights, and obligations of the government				
	DE = Subpoenas will be destroyed because significant records related to cases will be retained from 350-20 and from the records maintained by Legal Services.				
-04	Oaths of office		SO	nil	DE
-20	Legal files (covers legal issues, legal opinions, judicial decisions, and legal challenges)		SO+1y	nil	SR

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

350      LEGAL MATTERS (continued)

SO = when no longer required to document precedents and protect the legal interests, rights, and obligations of the government

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 352      LEGAL REQUESTS FOR RECORDS

Records relating to legal requests for records in a ministry's or agency's control and custody that may be relevant in a lawsuit. This includes requests for records during the formal document discovery process.

Records types include correspondence, forms, lists, logs, and other types of records as indicated under relevant secondaries.

For information and privacy requests, see secondaries 292-30 and 292-40.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Legal request log		SO	nil	DE

SO = when updated and no longer required for reference purposes

NOTE: This log tracks the status of all legal requests for records. It is created and maintained on a word processing document, spreadsheet or simple database.

-03	Legal request search strategies		SO	nil	DE
-----	---------------------------------	--	----	-----	----

SO = when no longer required for reference purposes

NOTE: This secondary documents the strategy used by records staff in retrieving records that were difficult to locate. The information is used in responding to future similar legal requests for records.

-20	Legal requests for records (includes copies of court orders and writs of summons, signed file and file list transmittal slips, lists of active and semi-active records in the government lawyer's possession, and signed forms or affidavits confirming that the search for potentially relevant records has been completed)		SO+1y	nil	DE
-----	---	--	-------	-----	----

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## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 352      LEGAL REQUESTS FOR RECORDS (continued)

SO = upon written confirmation to the requesting lawyer that all reasonable attempts to locate records have been made and when no longer required for reference purposes

DE = Legal requests for records can be destroyed upon approval of the Records Officer because civil actions to which the Crown is a party are documented in case files maintained by Legal Services.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 355 LEGISLATIVE MATTERS

Records relating to Legislative Assembly actions on matters relevant to ministries and agencies.

Records types include correspondence, parliamentary inquiry documents, briefing materials, and other types of records as indicated under relevant secondaries.

For bills and other legislation, see primaries 125 and 140.

For cabinet submissions, see primary 201

For estimates debate supporting material, see primary 1000.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01 General

-04 House briefing materials and questions  
(supersedes former secondary 355-03 Questions in the house)

SO

nil

SR

SO = upon conclusion of legislative session, and when no longer required for reference purposes

NOTE: Classify supporting material for estimates debates under primary 1000.

-07 House documents

SO

nil

DE

(covers reports and resolutions, Throne speech, orders of the day, votes and proceedings, and parliamentary debates [Hansard])

SO = upon conclusion of legislative session, and when no longer required for reference purposes



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 358      LIBRARY AND TOPICAL REFERENCE MATERIALS

Records relating to ministry/agency reference resources gathered from various sources to use for information purposes. This primary provides for the retention and disposition of published and unpublished material acquired for a ministry/agency library or for general reference purposes by any other government office (i.e., topical files).

Record types include articles, audiovisual materials, books, brochures, correspondence copies, journals, magazines, manuals, newsletters, newspaper, periodicals, pamphlets, and reports in all media formats.

NOTE: This primary is not a library classification system; rather it allows libraries to retain and dispose of published and unpublished materials as required.

NOTE: Library/reference materials that relate to specific administrative or operational functions may be classified under the appropriate *ARCS* or *ORCS* secondary.

For audio-visual and graphics material collected for communications purposes, see primary 306.

For the production of ministry/agency publications, see primaries 308 and 312.

For transitory records, see Transitory Information (schedule 102901).

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

SO      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

-20      Library/reference materials

SO      nil      DE

(covers external publications and copies of internal publications and correspondence)  
(does not cover original correspondence or reference material that is an integral part of another file)

SO = when no longer needed for reference purposes, and when master copies of any original publications have been filed under *ARCS* secondary 312-05 or under the appropriate *ORCS* secondary.

(continued on next page)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

358      LIBRARY AND TOPICAL REFERENCE MATERIALS (continued)

NOTE: If there are multiple copies of a publication, the extra copies can be disposed of using the special schedule (Transitory Records).

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 360 LIBRARY SERVICES

Records relating to services provided by ministry/agency libraries.

Record types include correspondence, lists, forms, manuals, indexes, bibliographies, and reports.

For accounts payable, see primary 925.

For delegation of authority, see primary 265.

For knowledge management, see primary 400.

For library holdings, see primary 358.

For purchase orders, see primary 825.

For memberships in associations, societies, etc., see primary 160.

Unless otherwise specified below, the ministry or agency OPR (ministry/agency libraries) will retain these records for:

SO      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures      - OPR      SO      nil      DE

- non-OPR      SO      nil      DE

-01      General

-20      Acquisition and cataloguing records      SO      nil      DE

(covers acquisition lists, cataloguing in publication (CIP) program, classification schedules, descriptive cataloguing manuals, indexes to catalogued material, library coding input entry forms (completed), and subject analysis standards, library holdings list, binding, commercial and government publication catalogues, corporate procurement solutions reports, subscription agency services, newspaper and periodical subscriptions and renewals, and new title listings from other libraries)

PIB      -30      Circulation and reference records      SO+1y      nil      DE  
(covers inter-library loans, circulation, on-line search services, reading-room, telephone, and written requests)

1y =      The retention period satisfies the one-year retention period specified for personal records under the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165, s. 31).

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 370      LICENCES AND PERMITS

Records relating to authorizations given to ministries and agencies and/or their staff for activities that require a licence or permit.

Record types include correspondence, licences, and permits.

For agreements, see primary 146.

For dangerous goods shipping documents and permits, see primary 375.

For firearm permits, see primary 747.

For intellectual property licences, see primary 345.

For licences and permits granted by ministries and agencies, see primary 1120 and the *ORCS* of the relevant program.

For parking permits, see primary 877.

For radio frequency licences, see primary 6890.

For software licences, see primary 737.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

-20	Licence and permit files (covers shipment permits)	SO	7y	DE
-----	---	----	----	----

SO = upon expiry of the licence or permit

7y = The retention period is based on the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 375 POSTAL, COURIER, AND FREIGHT SERVICES

Records relating to postal, courier and freight delivery services used by ministries and agencies.

Record types include correspondence, delivery slips, forms, lists, and logs.

For correspondence tracking, see primary 255.

For customs and excise duties and tax reporting, see primary 1210.

For warehouse receipts (e.g., bills of lading and waybills), see primary 825.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-02	Postal, courier, and freight services (covers Canada Post, Ministry mail delivery system, government postal services, and private courier services)		SO	nil	DE
-----	--	--	----	-----	----

-06	Postal delivery/courier logs (covers mail logbooks [incoming and outgoing])		SO	nil	DE
-----	--	--	----	-----	----

-07	Postal mailing lists		SO	nil	DE
-----	----------------------	--	----	-----	----

-09	Postal/courier delivery slips		SO	nil	DE
-----	-------------------------------	--	----	-----	----

NOTE: This secondary covers slips that accompany delivered mail and packages. Classify warehouse receiving documents such as bills of lading and waybills under primary 825.

-10	Dangerous goods shipping documents and permits		SO	2y	DE
-----	--	--	----	----	----

SO = upon delivery of shipment and, if applicable, upon expiry of permit

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 375      POSTAL, COURIER, AND FREIGHT SERVICES (continued)

2y =    The retention period satisfies the two-year retention period stipulated for dangerous goods shipping documents under the *Transportation of Dangerous Goods Act* (Statutes of Canada 1992, c. 34) and *Transportation of Dangerous Goods (TGD) Regulations* (SOR/2008-34, Part 3.11), as well as the two-year retention period for commencing an action under the *Transport of Dangerous Goods Act* (RSBC 1996, c. 458).

NOTE: Dangerous goods shipping permits are only issued for exemptions to the provisions in the legislation.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 390 OFFICE SUPPORT SERVICES

Records relating to office support services (e.g., secretarial, data entry, reproduction, and translation services).

Record types include correspondence, forms, and reports.

For accounts payable, see primary 925.

For administrative procedures manuals, see primary 195.

For blank forms, see Transitory Information (schedule 102901).

For contracts, see primary 1070.

For office equipment, see primary 700.

For purchase orders, see primary 825.

For records filing, see primary 423.

For telecommunication equipment, see primary 700.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below,  
all other offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01 General

-02 Office support services

(covers translation services, duplication and reproduction services, telephone/switchboard support services, errors and accuracy, turnaround time, transfer of tapes, job account coding, and completed data entry instruction forms)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 400 PLANNING, PERFORMANCE, AND PROJECTS

Records relating to ministry/agency planning and performance, including branch and program planning, as well as projects and initiatives undertaken for cross-government benefit (e.g., mentoring, climate action, knowledge management, and workstation refresh) or by administrative program areas (with the exception of building and Information Technology [IT] development projects).

Record types include correspondence, plans, reports, and other types of records as indicated under relevant secondaries.

For budget planning, see primary 1000.

For building projects, see primary 525.

For employee performance and development plans (EPDPs), see primary 1385.

For the government's overall strategic plan, see the records of Treasury Board Staff.

For "operational" projects, see the relevant program *ORCS*.

For project management oversight and support, see primary 405.

For staffing planning, see primary 1580.

For strategic human resource planning, see primary 1705.

For IT projects, see primary 6450.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00 Policy and procedures - OPR SO nil DE

- non-OPR SO nil DE

-01 General

-02 Final annual reports (not covered in an *ORCS*) SO nil FR

(covers final published and unpublished reports)

OPR = Ministry/agency's own annual report if it is not classified under the relevant *ORCS*. Apply the non-OPR retention period and final disposition to all other published annual reports.

FR = The government archives will fully retain each ministry/agency final published annual report (not covered in an *ORCS*) because they summarize the B.C. government's goals, objectives, and performance measures in regards to its policies, programs, and services.

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[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 400 PLANNING, PERFORMANCE, AND PROJECTS (continued)

Each year staff will set aside one copy of each final published annual report for transfer to the government archives (print and box with other FR records or transfer via the government EDRMS).

NOTE: The development of these reports is covered by secondary -20.

NOTE: Annual reports were replaced in fiscal year 2002/03 by annual service plan reports.

-10      Final internal strategic and business plans      SO      nil      FR

FR = The government archives will fully retain final approved internal strategic and business plans because they provide a concise description of ministry/agency program goals, objectives, and performance measures.

After each significant update, staff will set aside one copy of each final approved strategic and business plan for transfer to the government archives (print and box with other FR records or transfer via the government EDRMS).

NOTE: The development of these plans is covered by secondary -20.

-20      Ministry/agency planning and performance files      SO      2y      DE  
(covers standards development, modelling, goal-setting [objectives], joint planning strategies [inter-agency], strategic planning, business planning, mission statements, program planning, program implementation, quality assurance, and service standards)  
(includes correspondence, work plans, annual service plans and reports, planning and performance reports [weekly, quarterly, trimester, monthly], business plans, information technology [IT] plans [e.g., information resource management plans], knowledge management plans, climate change plans, spreadsheets, and working documents)

SO = when no longer required for planning or performance evaluation and reporting

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 400 PLANNING, PERFORMANCE, AND PROJECTS (continued)

DE = Ministry/agency planning and performance files can be destroyed upon authorization of the Records Officer because planning activities are sufficiently documented in secondaries -02 and -10, or in primary 280, ministry ORCS, and executive records.

NOTE: This secondary covers researching, establishing, and implementing ministry/agency objectives, goals, performance measures, targets, priorities, and programs, as well as the development of plans, reports, and other goal-setting documents. It also includes knowledge management strategies, plans, and activities.

-40	Cross-government and administrative project files (covers organization/reorganization projects, public relations projects, and program status and needs)	SO	2y	DE
-----	---	----	----	----

SO = upon project completion or cancellation

DE = Cross-government and administrative project files can be destroyed upon authorization of the Records Officer because significant projects are adequately documented in executive records covered by primary 280 and/or by special schedule 102906.

NOTE: This secondary covers cross-government and administrative program projects and initiatives (e.g., mentoring, climate action, knowledge management, workstation refresh, but not building and computer application development and enhancement projects). Projects range from small, short-term assignments to large-scale, complex projects that require business cases, project plans, project charters, detailed scope, schedule, and budget documentation, risk management plans, and overall project management.

-50	Management review/evaluation of internal programs (covers program evaluation projects and other audits and reviews)	SO	2y	DE
-----	--	----	----	----

SO = upon completion of review or evaluation and when corrective action is taken

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 400      PLANNING, PERFORMANCE, AND PROJECTS (continued)

DE = These records can be destroyed upon authorization of the Records Officer because significant management reviews and evaluations are adequately documented in executive records covered by primary 280 and/or by special schedule 102906.

NOTE: These records document management reviews and evaluations of the effectiveness of internal programs in achieving their objectives and the efficiency with which they are administered.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 405      PROJECT MANAGEMENT SUPPORT

Records relating to project management support provided within ministries and agencies to internal business areas and program areas. This involves developing project management methodologies, frameworks, tools, and templates; reviewing and evaluating groups of ministry/agency projects for adherence to project management principles and practices and recommending improved approaches and techniques; and reporting to senior management on the status and performance of all ministry/agency projects.

Record types include correspondence, templates, reports, and other types of records as indicated under relevant secondaries.

For projects, see primary 400.  
For training, see primary 1735.

Unless otherwise specified below, the ministry or agency OPR (ministry/agency project management offices) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Project performance reporting to senior management		SO	nil	DE

SO = when no longer required for reference purposes

NOTE: This secondary covers reports, including key performance indicators (KPIs) submitted at regular intervals (e.g., monthly and quarterly) to senior management on the status and performance of ministry/agency projects.

-20	Project management material development files	SO	2y	DE
-----	---	----	----	----

SO = upon development and release, or when cancelled

NOTE: This secondary covers material such as methodologies, frameworks, tools, and templates developed by ministry/agency project management offices. Project management material received from the central project management agency is covered by secondary 195-45 B.C. central agency circulars/directives/manuals.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
405	<u>PROJECT MANAGEMENT SUPPORT</u> (continued)			
-30	Project management practice evaluation files	SO	2y	DE

SO = upon completion of evaluation

NOTE: These records document the review and evaluation of ministry/agency projects for adherence to project management principles and practices, and may include recommendations for improved approaches and techniques.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
415	<u>PROTOCOL</u>				
	Records relating to diplomatic etiquette and protocol, including the order of precedence for engaging dignitaries.				
	Record types include correspondence and lists.				
	For employee awards and honours, see primary 1310.				
	For visits and tours by visiting dignitaries, see primary 490.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	<u>SO</u>	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Canadian awards and honours information				
-03	Consular Corps information				
-04	Precedence lists (covers provincial, federal and consular precedence lists)		SO	nil	DE
DE =	These records can be destroyed upon authorization of the Records Officer because precedence lists and other protocol records are retained by the Office of Protocol.				

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 432 RECORDS MANAGEMENT (RM)

Records relating to the management of ministry/agency records including the control and administration of ministry/agency files, development and amendment of records schedules (*Operational Records Classification Systems* [ORCS] and ongoing records schedules [ORS], the maintenance and retrieval of records in offsite storage, and the disposition (i.e., destruction or transfer) of both onsite and offsite records.

Record types include correspondence, records schedules, forms, lists, reports, and other types of records as indicated under relevant secondaries.

For agreements, see primary 145.

For audits and compliance, see primary 975.

For disaster recovery plans for vital records, see secondary 275-30.

For records storage, retrieval, and disposition reports, see appropriate case file in this primary.

For registering and tracking the status of accessions, applications, and schedules, see secondary 100-05.

For training, see primary 1735.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures (covers approved records schedules as well as other policy documentation)	-OPR <u>-non-OPR</u>	SO <u>SO</u>	nil <u>nil</u>	DE <u>DE</u>
-----	---	-------------------------	-----------------	-------------------	-----------------

-01 General  
-02 (superseded by secondary -20 Accession case files, -30  
Destruction case files – authorized internally, or -35  
Destruction case files – authorized by central records services  
agency)

-09 (superseded by secondary 100-05 Lists, spreadsheets, and  
registers)

-10	File lists and indexes (supersedes secondaries 423-03 Current file lists and 423-05 File retrieval indexes)		SO	nil	DE
-----	---	--	----	-----	----

SO = when file list/index is updated, or all records have been  
destroyed, sent to storage, or transferred to archives  
(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
432	<u>RECORDS MANAGEMENT (RM)</u> (continued)			
-12	OPR designations/matrices	SO	nil	DE
	SO = when documentation is updated and no longer relevant for current files			
-15	RM support service requests and responses (arrange by office name, then chronologically) (covers helpdesk correspondence and other types of requests relating to records management services provided to clients throughout government) (does not cover requests relating to accessions; classify those under secondary 432-20) (supersedes secondary 420-06 Records management service requests)	CY+1y	nil	DE
	NOTE: Classify follow-up action on relevant RM advisory issues case file (secondary -50)			
-20	Accession case files (arrange by accession number) (covers authorities to transfer records and apply approved schedules [ARS 617], authorities to apply schedules [ARS 130], and other forms) (includes file lists, forms, and correspondence)	SO	nil	DE
	SO = when no longer needed to locate and retrieve files or for other reference purposes			
	DE = These files can be destroyed because key information about accessions is retained in the Master accession case files maintained by the central records services agency in accordance with the <i>Records Management Services ORCS</i> (Schedule 201294).			
-25	Custody management case files (covers documentation of the management and transfer of legal custody of records) (supersedes secondary 423-20 Custody management files)	SO	nil	DE
	SO = upon completion of transfer and when no longer required for reference purposes			

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 432      RECORDS MANAGEMENT (RM) (continued)

NOTE: This secondary is for cases where legal custody of records is transferred to or from another ministry/agency, or legal custody is permanently transferred from the provincial government to another entity (i.e., permanent alienation of records).

The office responsible for administration and care of the records is their legal custodian. Both the prior and new legal custodians will need to establish files under this secondary.

-30	Destruction case files – authorized internally (covers final disposition actions [i.e., destructions] administered by the ministry/agency) (includes correspondence, file lists, Records Destruction Authorizations [ARS 518], Tobacco Form for Destruction Applications [Form D], and other forms)	CY+30y	nil	DE
-----	---	--------	-----	----

OPR = Office with signing authority for destruction, i.e., either the office of the agency Records Officer or other office with authority for sign-off of the relevant category of destruction.

If your ministry requires central records services agency sign-off for disposition actions, use secondary - 35 (below) instead of this one.

31y = allows time for program area accountability issues to emerge and be addressed

DE = Records that document destroyed records can be destroyed when they become inactive because the existence of these records is adequately documented in approved records schedules, and the disposition process is adequately documented in policy.

-35	Destruction case files – authorized by central agency (covers final disposition actions [i.e., destructions] administered by individual offices upon authorization of the central records services agency Ministry Records Officer) (includes correspondence, file lists, Records Destruction Authorizations [ARS 518], Tobacco form for destruction Applications [Form D], and other forms)	SO+1y	nil	DE
-----	--	-------	-----	----

SO = when no longer needed for reference purposes (e.g., when the file has had no activity for over two years)  
(continued on next page)

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 432 RECORDS MANAGEMENT (RM) (continued)

DE = These records can be destroyed when they become inactive because the existence of destroyed records is adequately documented in central records services agency records.

- |     |   |       |     |    |
|-----|---|-------|-----|----|
| -40 | Operational records schedule development/amendment files (covers development and review of new and amended ORCS and other ongoing records schedule) (includes agendas, amendment packages, archival appraisal documentation, correspondence, drafts, presentation notes, review documentation, signed project charters, and working notes) (supersedes secondary 430-30 Operational records schedule development/amendment) | SO+5y | nil | DE |
|-----|---|-------|-----|----|

SO = when a comprehensive amendment has been completed, or when the schedule is no longer in use, or when the development project has been abandoned, and when no longer needed for reference purposes

DE = These records can be destroyed when no longer needed because records schedules and the associated archival appraisal decisions are adequately documented in approved ORCS and ORS master copies, which are fully retained under the central records service agency's *Records Management Services ORCS* (Schedule 201294).

NOTE: This secondary is for use when a ministry or agency develops or amends its own ORCS. For documentation of ORCS developed by the central records services agency, use secondary -45 instead.

- |     |  |    |     |    |
|-----|--|----|-----|----|
| -45 | Other schedule consultation files (covers review and amendment of schedules [e.g., administrative and special schedules] that are the responsibility of the central records services agency or another agency) (supersedes secondary 430-20 Other schedule consultation files) | SO | nil | DE |
|-----|--|----|-----|----|

SO = upon approval and publication, or abandonment, or when no longer needed for reference purposes (e.g., after no activity on the file for one calendar year)

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
432	<b><u>RECORDS MANAGEMENT (RM)</u></b> (continued)			
-50	RM advisory issues case files (arrange by office name or by issue, as appropriate) (covers issues that escalate beyond the liaison and advice normally provided, and other issues warranting a special file; e.g., vital records, records preservation / conservation, digital imaging, or microfilm) (includes correspondence and working materials) (supersedes secondary 420-25 Records management issues)	SO+5y	nil	DE
	SO = when the issue is resolved or closed, and when no longer required for reference purposes			
	DE = These records will be destroyed because records management issues are sufficiently documented in central records services agency records and policies.			
-60	RM projects and plans (supersedes secondaries 420-35 Records management plans, 420-40 Records management projects, 423-30 Records inventories and retention studies, and 430-50 Records schedule implementation files)	SO+2y	nil	DE
	SO = when project/plan is completed, replaced or abandoned (e.g., when no new documentation has been added to the file for five years)			
	NOTE: Classify disaster recovery plans for vital records under secondary 275-30.			

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 440 REPORTING AND STATISTICAL ANALYSIS

Records relating to the reporting and statistical analysis of administrative activities not covered elsewhere in ARCS.

Record types include correspondence and reports.

For annual reports, see primary 400.

For financial reports and statistics, see primary 1180.

For planning and performance reporting, see primary 400.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below,  
all other ministry offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01 General

-02 Reports register

SO      nil      DE

SO = when updated and no longer required for reference  
purposes

-20 Reports and statistics (not covered elsewhere)

CY+1y      nil      DE

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 450 RISK MANAGEMENT AND INSURANCE

Records relating to establishing risk management strategies, developing effective loss control and reporting systems, obtaining insurance coverage, and handling claims for injury or damage.

Record types include correspondence and reports.

For the administration of employee insurance benefits, see primary 1315.

For business continuity plans, see primary 275.

For claims payable from or to the Crown, see primaries 925 and 935.

For loss reporting, see secondary 470-08.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Insurance coverage		SO+1y	2y	DE

SO = when the insurance is replaced with a new policy, or not renewed, or the exposure does not exist anymore

3y = The retention period is consistent with the retention period for related insurance policy records maintained by the central agency under the *Provincial Treasury ORCS* (schedule 890168). It is based on the one-year retention period for commencing an action under the *Insurance Act* (RSBC 1996, c. 236, s. 22[1]). The additional two years provide for extensions and the service of documents.

PIB	-20	Claims for injury or damage	SO+1y	2y	DE
-----	-----	-----------------------------	-------	----	----

SO = when claim is resolved and closed, and if applicable, when minors named in the claim reach the age of majority (i.e., 19 years)

3y = The retention period is based on the two-year limitation period for commencing an action arising from property damage or personal injury under the *Limitation Act* (RSBC 1996, c. 266, s. 3), plus one year for the service of documents.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 450      RISK MANAGEMENT AND INSURANCE (continued)

NOTE: Classify employee work-related accidents and injuries under secondary 1560-20.

-30      Risk management files      SO+1y      nil      DE

SO =    upon project completion or cancellation, resolution of issue, or provision of information, whichever is relevant

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 470      SECURITY MANAGEMENT

Records relating to the security of ministry/agency buildings, facilities, and information systems.

Record types include correspondence, logs, reports, and other types of records as indicated under relevant secondaries.

For computer system backup records, see primary 6820.

For criminal and police record checks related to staffing competitions, see primary 1665.

For disaster recovery/emergency measures, see primary 275.

For insurance claims, see primary 450.

Unless otherwise specified below, the ministry or agency OPR (ministry/agency security departments) will retain these records for:

CY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-03      Security activity and control records

CY+1y

nil

DE

(covers building, facility, equipment [including vehicle] access control, key and pass allocations, and sign-in/out logs, including electronic sign-out/employee location tracking systems, and daily logs maintained by security personnel)  
(supersedes and merges former secondaries 465-02 Identification tags, 470-02 Security distribution and control list, and 470-03 Building security)

NOTE: Classify computer access permissions/authorizations under secondary -40. Reclassify records that support investigations under secondary -20.

-04      Intrusion detection records

SO

nil

DE

(covers intrusion detection systems and computer protection systems)  
(includes alarm and detection system data and reports)

SO =    when reviewed, and if relevant, when action is taken

NOTE: Reclassify intrusion detection records that relate to investigations under secondary -20.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
470	<u>SECURITY MANAGEMENT</u> (continued)			
-06	Security assessments (covers security threat and risk assessments [TRAs] or equivalent, system penetration tests, and "Healthcheck assessments") (includes correspondence, forms, and checklists) (supersedes former secondary 470-06 Threats to security)	SO	nil	DE
	OPR = program area responsible for the computer system, manual process, or activity being assessed			
	SO = when replaced by new assessment or test and corrective action is taken; or when related computer system, manual process, or activity is obsolete			
-07	Security bulletins	CY+1y	nil	DE
	NOTE: These records communicate best practices, security threats and vulnerabilities to staff.			
-08	Security incident and loss reporting (covers asset loss investigation reports, branch incident reports [BIRs], general incident or loss reports [GILRs] – FIN595, and equivalent reports relating to flooding, vandalism, theft, and other security incidents)	CY+2y	nil	DE
	2y = The retention period is based on the two-year limitation period for commencing an action arising from property damage or personal injury under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3).			
	NOTE: Reclassify security incident and loss reports resulting in investigations under secondary -20.			
-09	Security-monitored logs (covers application, server, network, website, system, event, audit, and equivalent logs monitored by security personnel)	CY+2y	nil	DE
	NOTE: Reclassify logs relevant to an investigation under secondary -20. Classify logs relating to system operations and maintenance under secondary 6820-06)			

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**ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM**

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
470	<u>SECURITY MANAGEMENT</u> (continued)			
	-10 Surveillance recordings (includes video, audio, digital, and other types of surveillance recordings)	SO	nil	DE
	SO = when recordings are no longer required			
	NOTE: Reclassify recordings resulting in an investigation under secondary -20.			
	FOI: Use surveillance recordings in scheduled rotation and erase all previous recordings prior to reuse. Public bodies must securely dispose of old recordings.			
	-11 Systems security control documentation (covers records documenting security controls for computer systems [e.g., authorization matrices])	CY+5y	nil	DE
PIB	-20 Security incident investigation files (includes correspondence, reports, and if relevant, investigators' notebooks, surveillance recordings, security logs, and exhibit records)	SO+1y	2y	DE
	SO = when investigation is closed			
	3y = The retention period is based on the two-year limitation period for commencing an action arising from property damage or personal injury under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3), plus one year for the service of documents.			
	DE = Security investigation files can be destroyed upon authorization of the Records Officer because information concerning significant investigations are adequately documented in executive records covered by primary 280 and/or by special schedule 102906.			
PIB	-25 Security clearance files (includes correspondence and forms)	SO+1y	nil	DE
	SO = upon expiry of clearance or date of decision to deny clearance			

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
470	<u>SECURITY MANAGEMENT</u> (continued)			
	-30 Security site files (includes contact lists, drawings, plans, and procedures)	SO+1y	nil	DE
	SO = when site is no longer utilized			
	NOTE: This secondary includes contact lists, site-specific security procedures, floor and wiring plans and inventory information on alarms, cameras, safes, drop boxes, keys, and other types of security equipment installed in ministry/agency buildings and facilities.			
	NOTE: Please notify the central records management agency before disposing of any files that contain building plans created before 1977 when British Columbia Building Corporation and its successors became the central agency responsible for these plans.			
PIB	-40 User IDs and access authority files (covers individual access to computer systems, USERIDs and access authorities) (includes correspondence and forms)	CY+2y	nil	DE
	NOTE: This secondary covers security authentication and access permissions/authorizations to ministry/agency computer applications. Classify building and equipment access control under secondary -03.			

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
490	<u>VISIT AND TRIP PLANNING</u>				
	Records relating to business trip planning, as well as information on royal and dignitary visits.				
	Record types include correspondence, itineraries, and reports.				
	For employee travel authorizations, expenses, and claims, see primary 1240.				
	For protocol, see primary 415.				
	Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
	-00 Policy and procedures	- OPR	<u>SO</u>	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01 General				
PIB	-30 Trip planning files (covers travel and dignitary visits)		SO+1y	nil	DE
	SO = upon trip completion or cancellation				
	DE = These records can be destroyed upon authorization of the Records Officer because significant records (e.g., royal and dignitary visits) are retained by the Office of Protocol.				

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### SECTION 2

#### BUILDINGS AND PROPERTIES

#### PRIMARY NUMBERS

500 - 699

Section 2 covers records relating to building and property management responsibilities of B.C. government ministries and agencies in compliance with the Province's facility management policies and directives. This includes records relating to: workplace accommodation planning, real estate acquisition and disposal, construction and renovation projects, and property maintenance and repair.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### SECTION 2

#### 500 - BUILDINGS AND PROPERTIES - 699

#### TABLE OF CONTENTS

500	BUILDINGS AND PROPERTIES - GENERAL
510	ACCOMMODATION PLANNING
525	BUILDING AND LAND MANAGEMENT
545	BUILDING DESIGN AND CONSTRUCTION PROJECTS

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 500 BUILDINGS AND PROPERTIES - GENERAL

Records not shown elsewhere in the buildings and properties section which relate generally to building and property management responsibilities of B.C. government ministries and agencies in compliance with the Province's facility management policies and directives.

Record types include correspondence, forms, and reports.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

For asset inventory, see primary 705.

For building and property security, see primary 470.

For building occupancy charges, see secondary 925-20.

For recycling contracts, see secondary 1070-20.

Unless otherwise specified below, the ministry or agency OPR (facilities management offices or equivalent) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-02	Accommodation requests and proposals		FY+1y	6y	DE
-----	--------------------------------------	--	-------	----	----

(covers signed minor client requests [MCRs], requests for service [RFS's], accommodation proposals [AP's], equivalent approval documents, and billing advice for tenant improvements)

7y = The retention period is consistent with the retention period for related financial records classified under section 4 *Financial Management*.

-03	Building and property subject files		SO	nil	DE
-----	-------------------------------------	--	----	-----	----

(covers subjects relating to warehousing, building directories, addresses and locations, signs, types of facilities, building codes, architects, consultants, contractors, janitorial services, painting, elevators, inventory, zoning, fencing, grounds maintenance, landscaping, snow removal, walkways (sidewalks, etc.), signs, heating systems, air conditioning/ventilation humidity control, disposal of hazardous materials, and recycling programs)

[Key to ARCS/ORCS Codes and Acronyms](#)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 510 ACCOMMODATION PLANNING

Records relating to ministry/agency accommodation planning and requirements, including employee residential accommodation, organizational moves, and space transfers.

Record types include correspondence, forms, plans, drawings, and reports.

For accommodation budgets, see primary 1000.  
For building occupancy charges, see primary 925.

Unless otherwise specified below, the ministry or agency OPR (facilities management offices or equivalent) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-02	As-built drawings - not centrally managed property (covers as-built drawings of buildings solely managed by a ministry or agency [e.g., not by ARES])		SO	nil	FR
-----	--	--	----	-----	----

SO = when property is sold or lease terminated, and when no longer required for reference purposes

FR = The government archives will fully retain as-built drawings of properties solely managed by a ministry or agency because they provide a history of the design and layout of government buildings over time.

-03	Building floor plans and drawings		SO	nil	DE
-----	-----------------------------------	--	----	-----	----

-06	Space inventory and allocation ( covers space allocation and space inventory (forms A and B))		SO	nil	DE
-----	--	--	----	-----	----

-09	Government employee residential accommodation units (covers housing provided for employees, typically in remote areas)		SO	2y	DE
-----	---	--	----	----	----

SO = when ministry/agency vacates the property

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
510	<u>ACCOMMODATION PLANNING</u> (continued)			
-20	Organizational moves and space transfers	SO	2y	DE
	SO = upon completion or cancellation of move and resolution of outstanding claims or issues			



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 525 BUILDING AND LAND MANAGEMENT

Records relating to ministry/agency building and land management responsibilities, including parking requirements and requests, real estate purchases and sales, easements and rights-of-way through property owned by ministries and agencies, leasing arrangements with prospective and existing landlords, indoor air quality (IAQ) testing, hazardous substance and environmental contaminant testing and remediation, and day-to-day property management activities (e.g., cleaning, ground maintenance and landscaping, snow removal, and mechanical, electrical, elevator, plumbing and utility system inspection, repair and maintenance).

Record types include correspondence, lease and sales agreements, land title documents, work orders, equipment maintenance logs, drawings, diagrams, plans, reports, and manuals.

For asset inventories, see secondary 705-20.

For construction projects, see primary 545.

For contracts, see primary 1070.

For disaster and emergency response planning, see primary 275.

For equipment operating manuals and warranties, see primary 700.

For insurance claims, see primary 450.

For occupational accidents and incidents, see primary 1560.

For occupational health and safety site assessments and inspections, see primary 1560.

For property damage incidents and investigations, see primary 470.

For vehicle parking permits, see primary 877.

Unless otherwise specified below, the ministry or agency OPR (facilities management offices or equivalent) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General  
             (covers vending machines, mobile vendors, price lists and menus)

-04      Building and space standards      SO      nil      DE

-06      Design/specification manuals - not centrally created      SO      nil      FR  
             (covers building design and specification manuals solely created by a ministry or agency, as opposed to the central real estate agency)  
             (continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 525 BUILDING AND LAND MANAGEMENT (continued)

FR = The government archives will fully retain building design and specification manuals created by a ministry or agency because they document government standards, guidelines, and requirements for the design of public buildings.

-07 Property management work orders      FY+2y      nil      DE

2y = The retention period is based on the two-year limitation period for commencing an action with respect to a personal injury under the *Limitation Act* (RSBC 1996, c. 266, s.3)

NOTE: These records document routine maintenance and repairs on leased and owned properties.

-30 Building and land case files - centrally managed      SO      2y      DE  
(covers centrally managed [e.g., ARES-managed] properties)  
(includes reports and case files relating to accommodation; building acquisition, disposal, inspection, and repair; client project status; elevator inspection; facility management; fire prevention; HVAC, garbage disposal and waste, lighting and electrical, natural and propane gas, and water and plumbing systems; flood control; land acquisition, appraisal, and disposal; parking; and property development and maintenance)

SO = when ministry/agency vacates the property

DE = Centrally managed building and land case files will be destroyed because records documenting these functions are fully retained from the central agency through the *Accommodation and Real Estate Services (ARES) ORCS*.

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
525	<b><u>BUILDING AND LAND MANAGEMENT</u></b> (continued)			
-40	Building and land case files - not centrally managed (covers property solely owned and/or managed by the ministry or agency, as opposed to the central real estate agency) (includes reports and case files relating to building repair; building and elevator inspections; fire prevention, HVAC, garbage disposal and waste, lighting and electrical, natural and propane gas, and water and plumbing systems; flood control; land appraisal and disposition; property development and maintenance; and parking)	SO	2y	DE
	SO = when property is disposed of or no longer used by government			
	NOTE: This secondary does not include the following records, which must be classified as follows:			
	<ul style="list-style-type: none"><li>• As-built drawings under secondary 510-02</li><li>• Building design and specification manuals under secondary 525-06</li><li>• Construction and renovation projects under secondary 545-40</li><li>• Contaminated sites and hazardous substance testing and remediation under secondary 525-45</li><li>• Leases under secondary 525-50</li><li>• Real estate projects under secondary 525-60</li></ul>			
-45	Contaminant files - not centrally owned properties (covers contaminant and hazardous substance [e.g., asbestos, mould, and radon gas] testing and remediation in properties owned solely by the ministry or agency, as opposed to the central real estate agency)	SO	2y	FR
	SO = when property is sold			
	FR = Contaminant files will be fully retained because they document hazards to the public for which the government has long term obligations and accountability. This disposition is consistent with the retention of related records in real estate and acquisition and disposal files (secondary 77000-30) in the <i>ARES ORCS</i> (schedule 140666).			
	(continued on next page)			

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 525      BUILDING AND LAND MANAGEMENT (continued)

NOTE: Classify contaminated sites and hazardous substance testing and remediation in properties that are centrally owned (e.g., by the central real estate agency) in the appropriate property file under secondary -30.

-50	Leases - not centrally managed (covers leases negotiated and managed solely by the ministry or agency, as opposed to the central real estate agency) (includes case files relating to building and land acquisition, and disposal)	SO	7y	DE
-----	--	----	----	----

SO = upon termination of lease or upon expiry of indemnity granted to the Province, whichever is later

7y = The retention period is based on the six-year limitation period for commencing an action arising from economic loss under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

NOTE: Classify leases that are centrally managed (e.g., by the central real estate agency) in the appropriate property file under secondary -30.

-60	Real estate projects - not centrally managed (covers properties purchased and sold solely by the ministry or agency, as opposed to the central real estate agency) (includes case files relating to building and land acquisition and disposal)	SO	7y	FR
-----	---	----	----	----

SO = when property is sold, or upon abandonment of the real estate project

7y = The retention period ensures that sales agreements included in these files are retained for the six-year limitation period for commencing an action arising from economic loss under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

FR = The government archives will fully retain real estate project files for their significant evidential and informational values. They provide a comprehensive source of information on ministry and agency-owned properties.

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

525      BUILDING AND LAND MANAGEMENT (continued)

NOTE: Classify real estate projects that are centrally managed (e.g., by the central real estate agency) in the appropriate property file under secondary -30.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 545 BUILDING DESIGN AND CONSTRUCTION PROJECTS

Records relating to the planning, implementation, completion, and close-out of building design and construction projects.

Record types include correspondence, project charters, meeting agendas and minutes, agreements and approval documents, and plans and drawings.

For contracts, see primary 1070.

Unless otherwise specified below, the ministry or agency OPR (facilities management offices or equivalent) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
-----	-----------------------	-------	----	-----	----

		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
--	--	------------------	-----------	------------	-----------

-01	General (covers records of a general nature that relate to the construction of new buildings, facilities, and structures, and to the major renovation or expansion of existing structures)				
-----	---	--	--	--	--

-20	Construction projects - centrally managed (covers construction of new structures and major expansion and/or renovation of existing structures)		SO	2y	DE
-----	---	--	----	----	----

SO = upon project completion or cancellation, and when ministry/agency vacates the property

DE = Centrally managed construction project files will be destroyed because records documenting these functions are fully retained from the central agency through the *Accommodation and Real Estate Services ORCS*.

NOTE: Alternatively for administrative convenience, these records may be filed on the relevant property file under secondary 525-30.

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
545	<u>BUILDING DESIGN AND CONSTRUCTION PROJECTS</u> (continued)			
-40	Construction projects - not centrally managed (covers projects solely managed by the ministry or agency [e.g., not by the central real estate agency]) (includes case files relating to, construction of new structures and the major expansion and/or renovation of existing structures, )	SO	7y	DE
	SO = when property is sold or lease is terminated and property vacated, and upon expiry of applicable warranties			
	7y = The retention period is based on the six-year limitation period for commencing an action arising from economic loss under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3).			

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### SECTION 3

#### EQUIPMENT AND SUPPLIES

#### PRIMARY NUMBERS

700 - 899

Section 3 covers records relating to equipment and supplies acquired by B.C. government ministries and agencies in compliance with the Province's asset management and procurement policies and directives. This includes records relating to: goods procurement, asset control and disposal, and specific equipment and supplies purchased by ministries and agencies.



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### SECTION 3

#### 700 - EQUIPMENT AND SUPPLIES - 899

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700	EQUIPMENT AND SUPPLIES - GENERAL
705	ASSET MANAGEMENT
737	COMPUTER HARDWARE AND SOFTWARE
747	FIREARMS
825	PROCUREMENT OF EQUIPMENT AND SUPPLIES
847	SPECIAL ITEMS
877	TRANSPORTATION

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 700 EQUIPMENT AND SUPPLIES - GENERAL

Records not shown elsewhere in the equipment and supplies section which relate generally to ministry/agency acquisition, maintenance, and repair of equipment and supplies in compliance with the Province's asset management and procurement policies and directives.

Record types include correspondence, forms, work orders, and reports.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

For asset inventories and surplus disposals, see primary 705.

For contracts, see primary 1070.

For equipment-related accident and incident investigations, see primary 110.

For purchase requisitions and orders, see primary 825.

For sign-out records, see secondary 470-03.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00 Policy and procedures - OPR SO nil DE

- non-OPR SO nil DE

-01 General

-02 Equipment and supplies subject files SO nil DE

(covers subjects relating to dress regulations; ergonomic standards; fencing; first aid and survival kits; building and cleaning maintenance; clothing and uniforms; fuel performance, procurement, and types; general information about vehicles; rental rates; reports and lists relating to equipment, vehicle, and stationary; signs; and suppliers)

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 700      EQUIPMENT AND SUPPLIES - GENERAL (continued)

-20	Equipment and supplies history files (covers clothing issued to employees; equipment and supply history files; equipment requests/loans/renewals; guarantees and warranties; justification and supply reports; procurement, issue and use of telecommunication equipment and supplies; repairs and maintenance; and technical and operating manuals)	SO+1y	2y	DE
-----	---	-------	----	----

SO = upon replacement or disposal of equipment

3y = The retention period is based on the two-year limitation period for commencing an action arising from property damage or personal injury under the *Limitation Act* (RSBC 1996, c. 266, s. 3), plus one year for the service of documents.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 705      ASSET MANAGEMENT

Records relating to the control and inventory of ministry/agency assets, with the exception of financial assets. This includes identifying assets that have become surplus to a ministry's or agency's needs and to reporting and transferring the surplus assets to the agency authorized to dispose of government property.

Record types include correspondence, forms, and reports.

For asset accounting, see secondary 920-20.

For loss reporting, see secondary 470-08.

Unless otherwise specified below, the ministry or agency OPR (asset control officer or equivalent) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-20      Asset inventory records

(covers warehouse inventory, insurance on inventory, inventory control system updates, asset control case files, and stock control [supplies] inventory)

SO+3y

nil

DE

SO =    upon verification of data entry and replacement or disposal of asset

-40      Surplus asset review and transfer records

(covers condemnation and destruction, write-offs, and asset transfer and disposal reports)

SO+3y

nil

DE

SO =    upon asset replacement or disposal

NOTE: This secondary includes surplus asset decisions and approvals.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 737      COMPUTER HARDWARE AND SOFTWARE

Records relating to ministry/agency commercial off-the-shelf (COTS) software, hardware, storage media, and peripheral and multi-function devices (MFDs) (e.g., printers).

Record types include correspondence, forms, work orders, reports, and licence certificates and agreements, including relevant end-user licence agreements (EULAs).

For computer inventories, see primary 705.

For computer system operations, see primary 6820.

For computer orders (e.g., Oracle iStore orders), see primary 825.

For contracts, see primary 1070.

For reported incidents and user help and support, see primary 6820.

For service request approvals, see primary 6000.

For software and system development, see primary 6450.

For workstation refresh projects, see secondary 400-40.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

7y = The retention period is consistent with the seven year retention period for related computer hardware and software history files classified under secondary -25.

-01      General

-25	Computer hardware and software history files (covers guarantees and warranties, loans, technical and operating manuals, hardware, software and storage media care, handling, research, and history files, and inter-ministerial hardware transfers, )	SO	7y	DE
-----	--	----	----	----

SO = upon replacement or disposal of computer hardware or software

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

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A      SA      FD

### 737      COMPUTER HARDWARE AND SOFTWARE (continued)

7y =    The retention period is based on the six-year limitation period for commencing an action arising from economic loss under the *Limitation Act* (RSBC 1996, c. 266, s. 3), plus one year for the service of documents. It also ensures that software licenses and agreements are retained for the six-year limitation period.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 747 FIREARMS

Records relating to firearms issued by ministries and agencies.

Record types include correspondence, permits, forms, work orders, reports, and lists.

For inventories, see primary 705.

For purchase requisitions and orders, see primary 825.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified  
below, all other offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO

7y

FR

- non-OPR

SO

nil

DE

7y = The retention period is consistent with the seven year  
retention period for related firearm history and issuance  
files classified under secondary -20.

FR = Firearms policy and procedures will be fully retained by  
the government archives because they document  
ministry/agency rules related to responsible use of  
firearms. These records have significant evidential  
value.

-01 General

-20 Firearm history and issuance files

(covers guarantees and warranties, loans, technical  
and operating manuals, firearm types, firearms  
distribution lists, record of shipment, firearm permits,  
and firearm history files)

SO

7y

DE

SO = upon replacement or disposal of the firearm

7y = The retention period ensures that firearm permits are  
retained for the six-year limitation period under the  
*Limitation Act* (RSBC 1996, c. 266, s. 3).

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

## 825      PROCUREMENT OF EQUIPMENT AND SUPPLIES

Records relating to ministry/agency procurement of office equipment and supplies, furnishings, and other types of goods for government use.

Record types include correspondence, purchase requisitions (including Oracle iStore orders), purchase orders (POs), emergency purchase orders (EMOs), purchase orders on standing offers (POSOs) (e.g., Corporate Supply Arrangement [CSA] purchase orders), and packing slips.

For accounts payable, see primary 925.

For contracts, see primary 1070.

For delegation of purchasing authority, see primary 265.

For information technology order approvals, see primary 6000.

For petty cash purchases, see primaries 925 and 940.

For the procurement of services, see primary 1070.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General  
            (covers general information relating to master standing offers (government-wide) and standing offers (ministry specific))

-02	Purchase requisitions and purchase orders (covers purchase orders, requisitions, and other procurement instruments)	FY+1y	6y	DE
-----	--	-------	----	----

7y =    The retention period is consistent with the retention period for related financial records classified under section 4 *Financial Management*.

-04	Packing slips	SO	nil	DE
-----	---------------	----	-----	----

-06	Warehouse shipment receipts (includes correspondence, bills of lading, waybills, copies of purchase orders, and reports)	FY+1y	nil	DE
-----	---	-------	-----	----

NOTE: These records document equipment and supplies received in a warehouse or stockroom, as well as problems and discrepancies with the shipment.

[Key to ARCS/ORCS Codes and Acronyms](#)



This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

SR = Special item history files will be selectively retained by the government archives by retaining files that document significant technological innovations or advances.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

## 877      TRANSPORTATION

Records relating to ministry/agency-owned, leased, and rented modes of transportation. This includes motor vehicles (e.g., cars, vans, buses, and trucks), off-road and ancillary vehicles (e.g., golf carts, tractors, and trailers), and watercraft (e.g., boats, zodiacs, canoes, life boats, and ships).

Record types include correspondence, lease and rental agreements, work orders, warranty and maintenance records, tickets, accident reports, marine radio licenses and logbooks, and ship's logs.

For accident and incident investigations, see primary 110.

For inventories, see primary 705.

For parking arrangements and parking areas, see primary 510.

For vehicle sign-out records, see secondary 470-03.

Unless otherwise specified below, the ministry or agency OPR (	) will retain these records for:	SO	7y	DE
---	----------------------------------	----	----	----

Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>
---	-----------	------------	-----------

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

7y = The retention period is consistent with the seven year retention period for related motor vehicle and watercraft history files classified under secondaries -20 and -50.

-01	General		FY+1y	nil	DE
-----	---------	--	-------	-----	----

-20	Motor vehicle history files (covers guarantees and warranties, loans, technical and operating manuals, vandalism and theft, vehicle history files, insurance, registration, and licensing, operator abuse, private and non-government use of government vehicles, universal credit cards, vehicle assignment, disposal, lease/rental, and purchase, vehicle replacement and acquisition specifications, use of private vehicles, cost analysis/usage reports, maintenance and operating costs, maintenance and repair standards and requirements, preventative maintenance work, vehicle inspections, and vehicle accessories)		SO	7y	DE
-----	---	--	----	----	----

OPR = vehicle fleet coordinator or equivalent

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Contact your Records Officer.

A      SA      FD

### 877      TRANSPORTATION (continued)

NOTE: The government's central vehicle fleet administration agency (currently PHH Corporation on behalf of Purchasing Services Branch) maintains the master record of ministry vehicle purchases, leases, and rentals for a minimum of seven years.

-50	Watercraft history files (covers guarantees and warranties, loans, technical and operating manuals, returns of births and deaths, maintenance and repair, declarations of ownership, bills of sale, mortgage papers, transfer papers, certificates of survey correspondence, radio licenses, builder's certificates, applications for registration of a government ship, certificates of British Registry [Blue Book], transcripts and other copies of registry, ship's carving and marking notes, inspection certificates, small vessel history files, large vessel history files, ship's wheelhouse logbooks, ship's engine room watch log, radio logbooks, and repair notebooks)	SO	7y	DE
-----	--	----	----	----

SO = upon replacement or disposal of vehicle or vessel

7y = The retention period is based on the six-year limitation period for commencing an action arising from economic loss under the *Limitation Act* (RSBC 1996, c. 266, s. 3), plus one year for the service of documents.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### SECTION 4

#### FINANCIAL MANAGEMENT

#### PRIMARY NUMBERS

900 - 1299

Section 4 covers records relating to financial management responsibilities of B.C. government ministries and agencies under the authority of the *Financial Administration Act* (RSBC 1996, c. 138), *Budget Transparency and Accountability Act* (SBC 2000, c. 23), *Balanced Budget and Ministerial Accountability Act* (SBC 2001, c. 28), and *Financial Information Act* (RSBC 1996, c. 140), and in compliance with Treasury Board and Office of the Comptroller General policies, standards, and directives. This includes records relating to: the management of financial accounts, including accounts payable and receivable, budget development and control, cost-sharing arrangements and claims, procurement and contract management, grant and other transfer payment accounting, revenue and expenditure control, audits and compliance reviews, financial reporting and analysis, tax reporting, and Treasury Board submissions.

For asset purchasing, capitalization, and disposal, see Section 2, Buildings and Properties and Section 3, Equipment and Supplies.

NOTE: Office of the Comptroller-General authorizes the removal of credit card data from financial records in accordance with established policy and PCI (Payment Card industry) requirements. [Read memorandum here.](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### SECTION 4

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940	- STANDING AND OTHER ADVANCES
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975	AUDITS AND COMPLIANCE REVIEWS
985	BANKS AND BANKING
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1050	FINANCIAL TRANSACTION BATCHING AND POSTING
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1095	ENCUMBRANCES
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1130	FUND MANAGEMENT
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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

1250 TREASURY BOARD SUBMISSIONS

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 900      FINANCIAL MANAGEMENT - GENERAL

Records not shown elsewhere in the financial management section which relate generally to the financial management responsibilities of B.C. government ministries and agencies under the authority of the *Financial Administration Act* (RSBC 1996, c. 138), *Budget Transparency and Accountability Act* (SBC 2000, c. 23), *Balanced Budget and Ministerial Accountability Act* (SBC 2001, c. 28), and *Financial Information Act* (RSBC 1996, c. 140) and in compliance with Treasury Board and Office of the Comptroller General (OCG) policies, standards, instructions, and directives.

Record types include correspondence and reports.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

For financial management-related projects, see primary 400.

For service level agreements, see primary 146.

For signing authorities, see primary 265.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

SO = when replaced by new, approved version

7y = The retention period ensures that ministry/agency financial policies and procedures are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

NOTE: Secondary -00 covers specific ministry and agency internal financial management policies, procedures, guidelines, and instructions.

-01      General

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
900	<u>FINANCIAL MANAGEMENT - GENERAL</u>			
-04	Financial management topical files (covers interest rates on overdue accounts payable and receivable, security deposit subject material, and exchange rates)	SO	nil	DE
-20	Financial services advisory files	SO	nil	DE
	SO = upon resolution of problem or issue or when information is provided, and when no longer required to provide evidence of internal ministry/agency financial advice			
	NOTE: This secondary is intended for ministry and agency financial services departments that provide services to internal customers (e.g., program areas within their organizations). It covers unique client-specific advice, information, and support not related to regular financial functions or activities such as budget preparation. (See primary 1000 for budget preparation.)			



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 920      ACCOUNTS - GENERAL

Records relating to ministry and agency financial accounts not shown elsewhere in this primary block. This primary covers financial account analysis and reconciliation and chart of accounts development and maintenance.

Record types include correspondence, working papers, and reports.

For budget development, see primary 1000.

For financial statements, see primary 1180.

For ministry bank accounts, see primary 985.

For payroll accounting, see the records of Payroll Services.

For public accounts preparation and reporting, see primary 1180.

For special purpose accounts and trust funds, see primary 1130.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below,  
all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Chart of accounts (covers accounting codes)		SO+1y	6y	DE

SO = when replaced by a new, approved version

7y = The retention period is consistent with the retention period for period-end reports classified under secondary 1180-20 because earlier chart of accounts may be required to locate financial information in those reports.

NOTE: Each ministry and agency must establish and receive Office of the Comptroller General approval of a chart of accounts. The chart of accounts ensures consistent identification and reporting of financial information.

-20	Financial account analysis and reconciliation files (covers the reconciliation of revenues, expenses, balance sheet items, and the resolution of related issues and problems)		FY+1y	6y	DE
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### [Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 925      ACCOUNTS - PAYABLE

Records relating to amounts owed by ministries and agencies, which are paid from the consolidated revenue fund (CRF). The CRF is the main operating account of the B.C. government into which all public money of the government is held, other than exempted trust funds.

Record types include correspondence, applications, and other types of records as indicated under relevant secondaries.

For charge cards, see primary 1105.

For financial transaction batches, see primary 1050.

For payments from trust funds exempt from the CRF, see secondary 1130-03.

For salary payments, see the records of Payroll Services.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General (covers accounting for real property)				
-06	Direct deposit applications				

NOTE: This secondary covers copies of supplier and employee (i.e., non payroll) direct deposit applications maintained by ministries and agencies. The originals are maintained by Corporate Accounting Services for seven years after the supplier is no longer active. For payroll direct deposit applications, see the records of Payroll Services.

-20	Accounts payable files (covers security deposits, overdue accounts, invoice summary sheets, equalized payments, statements of account, consolidated revenue fund, and claim documents) (includes invoices, receipts, statements, payment requisitions, travel vouchers, expense claims, and other written requests for payment)		FY+1y	6y	DE
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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 925      ACCOUNTS - PAYABLE (continued)

8y =    The retention period is based on the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3) and the six-year assessment period under the *Income Tax Act* (RSC 1985, c. I-5, ss. 230(4) and 231.1)

NOTE: For administrative convenience, offices may classify expense claims under this secondary rather than under secondary 1240-20 or 1050-09. Other accounts payable batches may also be classified under this secondary rather than with financial transaction batches under secondary 1050-09.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 935      ACCOUNTS - RECEIVABLE

Records relating to amounts due to ministries and agencies. This involves the accounting and reconciliation of receivables, the collection of overdue accounts, and the write-off or extinguishment of uncollectible accounts.

Record types include correspondence, invoices, receipts, and reports.

For accounts receivable period-end reporting, see primary 1180.

For bank deposits, see secondary 985-03.

For claims made under cost-sharing agreements, see primary 950.

For encumbrances, see primary 1095.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below,  
all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-03	Cash register tapes and data (also known as point of sale systems)		FY+1y	6y	DE
-----	---	--	-------	----	----

Note: Office of the Comptroller-General authorizes the removal of credit card data from financial records in accordance with established policy and PCI (Payment Card industry) requirements.

-20	Accounts receivable files (covers security deposits, accounts receivable/receipt books, and consolidated revenue fund)		FY+1y	6y	DE
-----	---	--	-------	----	----

-30	Outstanding accounts subject to the <i>Limitation Act</i> (covers the collection of overdue accounts)		SO+1y	6y	DE
-----	--	--	-------	----	----

SO = upon the end of the fiscal year in which the debt is collected or written off

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

935      ACCOUNTS – RECEIVABLE (continued)

7y =    The retention period is based on the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

NOTE: Outstanding accounts not subject to the *Limitation Act* (e.g., court fines) are covered in the *ORCS* of the appropriate program area.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 940      ACCOUNTS - STANDING AND OTHER ADVANCES

Records relating to the control, reconciliation, and accountability of advances (e.g., petty cash, travel, and supplier advances).

Record types include correspondence, request forms, and reports.

For accounts payable, see secondary 925-20.

For salary advances, see the records of Payroll Services.

For travel cards, see primary 1105.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below,  
all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01      General

-20      Advance accounting and reconciliation files  
            (covers field-float, petty cash, salary, seconded or  
            exchange employee, working capital, other advances)

FY+1y      6y      DE

NOTE: For administrative convenience, these records may be  
classified with other financial reconciliation files under  
secondary 920-20.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 950 COST-SHARING ARRANGEMENTS AND CLAIMS

Records relating to ministry and agency cost-sharing arrangements with the federal government, other governments, and the private sector, as well as claims (e.g., monies and recoverable disbursements) made by ministries and agencies to those entities under the terms of the corresponding agreements.

Records types include correspondence, agreements, forms, and reports.

For accounts payable and receivable, see secondaries 925-20 and 935-20 respectively.

For audits, see primary 975.

For cost-sharing programs, see the *ORCS* of the relevant program.

For other agreements, see primary 146.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

-20	Cost-sharing agreement files (covers federal foreign local government, provincial, United States, and other agreements)		SO	7y	DE
-----	---	--	----	----	----

SO = upon expiry of the agreement and all extensions to the agreement, and upon conclusion of audit and other requirements stipulated in the agreement

7y = The retention period is based on the six-year limitation period for commencing an action with respect to a contract under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

DE = Cost-sharing agreement files can be destroyed upon authorization of the Records Officer because information about significant inter-jurisdictional agreements is selectively retained by the government archives from relevant program area *ORCS* and *ARCS* secondary 146-45.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 950      COST-SHARING ARRANGEMENTS AND CLAIMS (continued)

NOTE: For administrative convenience, these files may be classified with contract files under secondary 1070-20.

-25	Cost-sharing claim files (covers consolidated revenue fund)	SO+1y	6y	DE
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SO = when final payment is received and upon conclusion of audit and other requirements stipulated in the agreement

NOTE: For administrative convenience, these files may be classified with accounts receivable files under primary 935.



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 975 AUDITS AND COMPLIANCE REVIEWS

Records relating to audits and reviews performed on ministries and agencies by internal and external auditors. This includes financial audits; audits for compliance with government policy, legislation, and related authorities; special reviews and examinations of the efficiency, cost-effectiveness, and environmental effects of government programs, services, and activities; and investigative reviews of allegations of wrongdoing.

Record types include correspondence and reports.

For management reviews of internal programs, see secondary 400-20.  
For program audits and reviews, see the *ORCS* of the relevant program.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-05	External audit and review reports and findings	SO+1y	6y	FR
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FR = External audit and review reports and findings will be fully retained by the government archives because they document the findings of audits and reviews performed on ministries and agencies by external auditors. These records have significant evidential and informational value.

-20	External audit and review files (covers fraud and alleged fraud, Auditor General audits, federal audits, and other audits and reviews)	SO+1y	6y	DE
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SO = upon completion of audit or review and when corrective action is taken

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 975      AUDITS AND COMPLIANCE REVIEWS (continued)

DE = External audit and review files can be destroyed upon authorization of the Records Officer because the audit report and findings are fully retained in secondary -05 (External audit reports and findings).

NOTE: Examples of audits and reviews covered by this secondary are: Office of the Auditor General audits, including fraud investigations, federal audits, and police investigations of alleged wrong-doing.

-40	Internal audit and review files (covers fraud and alleged fraud, management representation letters, Comptroller General audit, and ministry internal audit)	SO+1y	6y	DE
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SO = upon completion of audit or review and when corrective action is taken

DE = Internal audit and review files may be destroyed upon authorization of the Records Officer because significant information is fully retained by the government archives in the *Office of the Comptroller General ORCS*, approved schedule 180968.

NOTE: Examples of audits and reviews covered by this secondary are: Office of the Comptroller General audits and reviews and ministry/agency internal audits and reviews, including internal investigations of alleged fraud and wrong-doing.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 985 BANKS AND BANKING

Records relating to the establishment, maintenance, and termination of ministry and agency bank accounts, the reconciliation of bank statements, and the bank deposit and tracking of all cash and cheques received.

Record types include correspondence, applications, statements, lists, forms, and other types of records as indicated under relevant secondaries.

For banking projects, see primary 400.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Bank statement reconciliation (not trust funds)		FY+1y	6y	DE

NOTE: This secondary covers monthly reconciliations of all deposits to and cheques drawn on ministry/agency bank accounts, except trust fund bank accounts. Trust fund bank statement records are classified under secondary 1130-20.

-03	Bank deposits (includes bank deposit books, deposit slips, copies of cheques, and other supporting documentation)		FY+1y	6y	DE
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NOTE: For administrative convenience, bank deposit slips and supporting records may be classified with the covering journal voucher under secondary 1050-04 or with other batched financial records under secondary 1050-09.

-04	Cash/cheque deposit logs (covers cash control) (includes spreadsheets or equivalent document)		FY+7y	nil	DE
-----	---	--	-------	-----	----

NOTE: These records list all cash and cheques received and deposited and relevant tracking information (e.g., journal voucher numbers and standard object [STOB] codes).

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 985      BANKS AND BANKING (continued)

-20	Bank account files (covers the establishment/termination of bank accounts) (includes bank account applications, annual bank account confirmations, lists of cheque signing authorities, and other ministry/agency bank account records)	SO+1y	nil	DE
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SO = when account is closed

NOTE: The master bank account information is maintained by the Banking and Cash Management Branch under the *Banking and Cash Management ORCS*, approved schedule 191019.

NOTE: For standard bank codes contact Banking and Cash Management, Provincial Treasury, Ministry of Finance.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

## 1000 BUDGETING

Records relating to ministry and agency annual budget forecasting, development, and allocation. This primary covers annual operating, capital, revenue and full-time equivalent (FTE) budgets.

Record types include correspondence, working papers, plans, reports, and other types of records as indicated under relevant secondaries.

For chart of accounts, see secondary 920-02.

For project budgets, see the relevant *ARCS* or *ORCS* project secondary.

For reporting on planned and actual budget costs, see primary 1180.

For service plans and other performance reports, see primary 400.

For training, information sessions, or workshops, see primary 1735.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-03	Estimates debate background material		SO	nil	DE
-----	--------------------------------------	--	----	-----	----

SO = upon budget approval, and when no longer required for reference purposes

NOTE: This secondary covers program fact sheets and descriptions and other financial and non-financial background material compiled to assist ministers in the annual estimates debates in the legislature. Records documenting the development of ministry/agency revenue and spending estimates are filed with budget development records under secondary -20.

-20	Budget files (covers budget estimates and planning, including vehicle budgets, reallocation of funds, approved budgets, expenditure and forecasts, and revenue forecasts)		FY+1y	6y	DE
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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 1000      BUDGETING (continued)

DE = Budget files may be destroyed upon approval of the Records Officer because the information in them is consolidated in the Province's budget, estimates, and public accounts, which are fully retained by the government archives in the *Office of Comptroller General ORCS*, approved schedule 180968.

NOTE: These records document annual budget forecasting, planning, development, allocation, reallocation, and monitoring of the approved budget, including its 12-month forecasted apportionment (i.e., calendarization),

This secondary includes vote descriptions, supplementary budget preparation records, the provision of budget development advice and information, and budget presentations and submissions to Treasury Board.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 1050      FINANCIAL TRANSACTION BATCHING AND POSTING

Records relating to the batching and posting of financial transactions.

Records types include correspondence, journal vouchers, batch tickets, invoices, cancelled cheques, receipts, and forms.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below,  
all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-04	Journal vouchers (covers transfer of expenditures, central agency chargebacks, claim documents, and financial reporting systems) (includes batched journal vouchers (JVs) and source documents)		FY+1y	6y	DE
-----	--	--	-------	----	----

NOTE: JVs are used to record internal transfers of money, sales of products and services to internal customers (e.g., chargeback and cost recovery transactions), and to make corrections to previously recorded transactions. They are used to update the general ledger and to a lesser extent subsidiary ledgers such as accounts payable.

NOTE: For administrative convenience, these records may be classified with other financial transaction batches under secondary -09.

-09	Financial transaction batches (covers batch control) (includes batched invoices, receipts, payment requisitions, travel and business expense claims, cancelled cheques, and stop payment and cheque replacement forms, and supporting documentation such as signed bonds of indemnity)		FY+1y	6y	DE
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## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

1050      FINANCIAL TRANSACTION BATCHING AND POSTING (continued)

NOTE: For administrative convenience, batched expense claims may be classified under this secondary rather than under 1240-20 or 925-20. Other accounts payable batches may be classified with all other accounts payable records under secondary 925-20.



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 1070      PROCUREMENT AND CONTRACT MANAGEMENT

Records relating to the acquisition of goods, services, and construction on contract.

This primary covers the procurement phases and vendor complaint review process for all procurements, and the contract management of most contracts.

It does not cover the management of the following contracts:

- third-party program delivery contracts
- complex, large-scale, long-term service contracts (e.g., Public-Private Partnerships and Alternative Service Delivery [ASD] initiatives)
- construction contracts that may require a longer retention period because of litigation concerns (e.g., bridge construction contracts); and
- contracts with guarantees, warranties, and indemnities that have long-term legal liability issues.

These contract management files are covered in the *ORCS* of the appropriate program area.

Records types include correspondence, lists, bids, proposals, contracts, and other types of records as indicated under relevant secondaries.

NOTE: Contact your Records Officer if you are uncertain as to whether your contract management files should be classified under this primary.

For accommodation agreements, see Section 3, Buildings and Properties.

For accounts payable, see secondary 925-20.

For copyright documentation relating to service contract deliverables, see secondary 345-50.

For cost-sharing agreements, see also primary 950.

For grants and transfer under agreements, see primary 1150.

For other agreements, see primary 146.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

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## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

			<u>A</u>	<u>SA</u>	<u>FD</u>
1070	<u>PROCUREMENT AND CONTRACT MANAGEMENT</u> (continued)				
-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Unsolicited offers of service		CY+1y	nil	DE
-03	Contractor eligibility lists		SO	nil	DE
	NOTE: Classify eligibility lists relating to a specific competition with the relevant procurement file in secondary -30.				
-20	Contract management files (covers standard contract form information, contract register, contract holdbacks, contract administration advice, accidents, liabilities and insurance, contract case files, and contract award, implementation, and evaluation,)		SO	7y	DE
	SO = upon expiry or termination of the contract and conclusion of all extensions to the contract				
	7y = The retention period is based on the six-year limitation period for the commencement of an action under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3).				
	NOTE: Classify assignments of copyright and waivers of moral rights agreed to in service contract negotiations under secondary 345-50 to ensure they are retained for 50 years. Copies of these documents may be retained in the contract management file.				
	NOTE: Contract management involves awarding and negotiating contracts, monitoring performance, resolving disputes, and performing post-contract evaluations.				
	NOTE: Contract management records include correspondence, final solicitation documents (e.g., requests for proposal), successful proposals or bids, contract negotiation documents, final contracts, contract amendments, certificates of insurance, change requests and change orders, payment schedules, contract monitoring and contract relationship documents (e.g., progress and status reports and issue resolution records), invoices, payment requisitions, and post-contract evaluation reports.				
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### [Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
1070	<u>PROCUREMENT AND CONTRACT MANAGEMENT</u> (continued)			
-30	Procurement files (covers contract bid/tender bonds, rejected/denied contracts, contract planning, pre-award, award, and planning)	SO	7y	DE
	SO = when contract is awarded and signed or upon cancellation of contract opportunity			
	7y = The retention period is based on the six-year limitation period for the commencement of an action under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3) and satisfies the one year for lodging a complaint under the vendor complaint review process.			
	NOTE: Procurement involves justifying the need for the contract, drafting the solicitation documents (e.g., Request for Proposal [RFP], Invitation to Quote [ITQ], or Invitation to Tender [ITT]), determining the evaluation criteria, evaluating offers, notifying winners and unsuccessful proponents and bidders, and debriefing unsuccessful proponents and bidders.			
	NOTE: Procurement records include:  Planning records: meeting minutes, feasibility studies, business cases, terms of reference, and contract approvals.  Solicitation records: solicitation documents such as requests for proposals (RFPs), requests for qualifications (RFQs), requests for information (RFIs), requests for expressions of interest (RFEIs), notices of intent (NOIs), approvals for advertising and copies of advertisements, eligibility lists, and records documenting information (e.g., questions and answers) provided to bidders and proponents.  Evaluation and award records: submitted bids and proposals, scoring and evaluation records, copies of eligibility lists and notices of intent, records documenting justification for direct awards, and contract award documentation.			

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## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1070      PROCUREMENT AND CONTRACT MANAGEMENT (continued)

NOTE: For administrative convenience, offices may classify procurement records with the contract management files under secondary -20, but in that event, they will be retained for the retention period governing secondary -20.

-40      Vendor complaint files      SO      7y      DE

SO =    upon resolution of complaint through the vendor complaint review process

7y =    The retention period ensures these records will be available for consultation in the event the vendor pursues further action through the courts.

DE =    Vendor complaint files may be destroyed upon approval of the Records Officer because significant vendor complaints are fully retained by the government archives in the *Office of the Comptroller General ORCS*, approved schedule 180968.

NOTE: This secondary covers complaints managed through ministry/agency vendor complaint review processes. Complaints that cannot be resolved by the ministry or agency are referred for final decision to the central agency responsible for procurement governance.

NOTE: Procurement complaints handled through other processes (e.g., Ombudsman or the courts) are classified in the relevant *ORCS*.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1095      ENCUMBRANCES

Records relating to encumbrances requested by ministries and agencies (which are currently limited to setoffs) in order to collect on overdue accounts. Setoffs allow for the redirection of government payments (e.g., supplier payments) to the recipient's outstanding debt with a ministry or agency.

This primary does not cover legally-served payment encumbrances such as garnishing orders and third-party demands. Those encumbrances are the responsibility of the Legal Encumbrances Branch of the Office of the Comptroller General.

Record types include correspondence and reports.

For legal encumbrances, as well as the processing of provincial setoff requests between ministries, see the *Office of the Comptroller General ORCS*, schedule 180968.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01      General

-20      Setoff files

SO+1y      6y      DE

(covers setoffs adjusting debt balances between government and individuals or agencies and other encumbrances)

SO = when set-off is cancelled or withdrawn, or when debt is paid in full

NOTE: This secondary covers due diligence analysis to confirm that the set-off is warranted and includes internal approvals, as well as requests to process or cancel the set-off.

NOTE: For administrative convenience, these records may be classified with outstanding accounts receivable records under secondary 935-30.

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1100      EXPENDITURE CONTROL - GENERAL

Records relating to the analysis, review, and reconciliation of ministry and agency expenditures and commitments, including chargebacks and liabilities (e.g., contingent liabilities such as guarantees and indemnities and leave liabilities such as retirement and vacation entitlements due to employees), not shown elsewhere in this primary block.

Record types include correspondence and reports.

For accounts payable, see secondary 925-20.

For budget development, see primary 1000.

For chargeback transactions, see primary 1050.

For contracts, see primary 1070.

For grants, contributions, and other transfer payments, see primary 1150.

For loans, see the *ORCS* of the relevant program area.

For travel advances, see primary 940.

Unless otherwise specified below, the ministry or agency OPR  
( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below,  
all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-30	Expenditure and commitment control files (covers transfer of expenditures, central agency chargebacks, appropriation and commitment control, and commitment reports)		FY+1y	6y	DE
-----	---	--	-------	----	----

NOTE: For administrative convenience, these records may be classified with other financial analysis and reconciliation files under secondary 920-20.

NOTE: Classify the reporting of actual and projected expenditures, commitments, chargebacks, and liabilities under primary 1180 with other period-end reports.

[Key to ARCS/ORCS Codes and Acronyms](#)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1105      EXPENDITURE CONTROL - PAYMENT INSTRUMENTS

Records relating to the authorization and management of payment instruments such as government charge cards (e.g., purchasing cards and travel cards) and business transaction accounts (BTAs) for ticket purchases from travel agencies.

Record types include correspondence, applications, account change forms, signed terms and conditions, and reports.

NOTE: Classify cardholder statements and accompanying sales slips, transaction logs, and other supporting documentation with accounts payable records under secondary 925-20 or with financial transaction batches under primary 1050.

For purchasing instruments (e.g., corporate supply arrangements and purchase orders), see Section 3, Equipment and Supplies.  
For vehicle service cards, see Section 3, Equipment and Supplies.

Unless otherwise specified below, the ministry or agency OPR (charge card or BTA coordinator) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01      General

PIB	-20	Payment instrument authorization files (covers telephone calling cards, debit card control (copy/printer cards), and credit cards)	SO	7y	DE
-----	-----	--	----	----	----

SO = when payment instrument (e.g., card or BTA) is cancelled

7y = The retention period is based on the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

-30	Payment instrument monitoring files (covers debit card control and transfer of expenditure)	SO	nil	DE
-----	--	----	-----	----

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1105      EXPENDITURE CONTROL - PAYMENT INSTRUMENTS (continued)

SO = upon completion of reconciliation and review and when corrective action is taken; or if the delinquent account has resulted in a write-off by the bank service provider (currently Bank of Montreal), the relevant monitoring records are reclassified under secondary -35.

NOTE: This secondary covers monthly reconciliations to ensure chargebacks issued by the central purchasing agency are cleared from ministry/agency clearing accounts, as well as reviews to ensure usage complies with program guidelines.

PIB	-35	Written-off delinquent account monitoring records	SO	7y	DE
-----	-----	---	----	----	----

SO = when payment instrument (e.g., card or BTA) is cancelled

7y = The retention period is based on the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

NOTE: This secondary covers monitoring records reclassified from secondary -30 because they relate to delinquent accounts that are written-off by the bank service provider.

NOTE: For administrative convenience, these files may be classified with the relevant payment instrument authorization file under secondary -20.



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1120 FEE MANAGEMENT

Records relating to the establishment and inventory of licence, permit, cost recovery, chargeback, and other non-tax fees administered and collected by ministries and agencies.

Record types include correspondence, fee schedules, rate guides, and services catalogues.

For fee payment transactions to or from external customers, see secondaries 925-20 and 935-20 respectively, or secondary 1050-09.

For fee payment transactions to or from internal customers (e.g., chargeback and cost recovery transactions), see secondary 1050-04.

For fee programs, see the *ORCS* of the relevant program area.

For fee proposals and approvals, see secondary 1000-20.

For membership fee information of associations, clubs, and societies, see primary 160.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-20	Ministry/agency fee inventory files (covers fee schedules for ministry services)		SO	nil	DE
-----	---	--	----	-----	----

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1130 FUND MANAGEMENT

Records relating to the financial management and control of funds separate from the Consolidated Revenue Fund (CRF) such as revolving funds, special purpose accounts, and trust funds.

Record types include correspondence, financial statements, bank statements, cancelled cheques, and reports.

For audits, see primary 975.

For fund payables or receivables through the CRF, see secondaries 925-20 and 935-20 respectively.

For fund programs, see the *ORCS* of the relevant program.

For public accounts reporting, see secondary 1180-20.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Fund annual reports - final		SO	nil	FR

FR = The government archives will retain one copy of each final annual report prepared by a fund. These reports describe the funds, including their funded programs and board functions, and summarize the major accomplishments for each year. They also include a financial report and itemize the funding provided for the year. They have significant evidential and informational value.

-03	Fund cheque payments (CRF-exempt) (includes payment requisitions and cancelled cheques)		FY+1y	9y	DE
-----	--	--	-------	----	----

11y = The retention period is based on the 10-year limitation period for commencing an action with respect to trusts under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1130      FUND MANAGEMENT (continued)

NOTE: This secondary covers cancelled cheques drawn on funds that are exempt from the CRF (e.g., Long Term Disability Fund and Court Trust Funds).

-20	Fund accounting files (covers fund and revolving fund/special account case files) (includes the fund's annual financial statements and monthly bank statements)	SO+1y	9y	DE
-----	---	-------	----	----

SO = upon completion of audit and when corrective action is taken

10y = The retention period is based on the 10-year limitation period for commencing an action with respect to trusts under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

NOTE: Records documenting the establishment and operation of these funds are covered in the *ORCS* of the relevant program area.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1150      GRANTS AND OTHER TRANSFER ARRANGEMENTS

Records relating to the financial management and control of grants and other transfers of money from ministries and agencies to individuals, businesses, and other external entities. Transfers are funding provided through grants, entitlements (e.g., social assistance), and transfer under agreements (TUAs) (e.g., contribution agreements).

Record types include correspondence, copies of award documents, signed agreements, and copies of payment requisitions.

NOTE: Classify applications, eligibility criteria, award documentation, and recipient reporting and monitoring in the *ORCS* of the relevant program.

For accounts payable, see secondary 925-20.

For B.C. government employee entitlements, see primary 1315 and the records of Payroll Services.

For contracts, see primary 1070.

For cost-sharing agreements, see primary 950.

For grants and other funding programs, see the *ORCS* of the relevant program area.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01      General

-20      Grant accounting files  
(covers discretionary funding awarded with no contractual obligations)

SO      7y      DE

SO = when grant is paid out or when grant is withdrawn or cancelled

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1150      GRANTS AND OTHER TRANSFER ARRANGEMENTS (continued)

7y =    The Comptroller General has advised that these records are required for seven years for program auditing purposes.

DE =    Grant accounting files can be destroyed because applications, eligibility criteria, award documentation, and recipient reporting and monitoring records are covered in the *ORCS* of the relevant program.

-25	Entitlement accounting files (covers non-discretionary payments to recipients who qualify for the payments under the program's eligibility criteria)	FY+1y	6y	DE
-----	---	-------	----	----

8y =    The retention period satisfies the program auditing requirements for these records.

-30	Transfer under agreement accounting files (covers funding provided under the terms and conditions of agreements [e.g., contribution agreements]) (includes signed agreements)	SO	7y	DE
-----	---	----	----	----

SO =    upon expiry or termination of the agreement and satisfactory completion of the funded project, program or service; and if applicable, upon completion of audit

7y =    The retention period is based on the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

DE =    Transfer under agreement accounting files can be destroyed because applications, eligibility criteria, award documentation, and recipient reporting and monitoring records are covered in the *ORCS* of the relevant program.

NOTE: For administrative convenience, these files may be classified with contracts under secondary 1070-20.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1180 PERIOD-END FINANCIAL REPORTING AND ANALYSIS

Records relating to financial reporting by accounting period to central agencies such as Treasury Board and the Office of the Comptroller General, as well as internal financial reporting to ministry/agency senior management. This includes the analysis and interpretation of the financial information in those reports.

Record types include correspondence, financial statements, working papers, and reports.

For chart of accounts, see primary 920.

For service plans and service plan reports, see primary 400.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-20	Period-end financial reports (covers public accounts preparation records, accruals, expenditure forecasts, and revenue forecasts)	FY+1y	6y	DE
-----	--	-------	----	----

8y = The retention period provides sufficient time for consultation and satisfies the government's three-year fiscal plan and the *Financial Information Regulation* (BC Reg 371/93, s. 10[2]) requirement that statements of financial information be retained for three years after the end of the year reported on.

NOTE: This secondary covers reports filed at month-end, quarter-end, and fiscal year-end (e.g., public accounts, statements of financial information [SOFI] under the *Financial Information Act* [FIA], ongoing accruals, accounts receivable, and accounts written-off at period-end).

-40	Report working records and supporting detail (covers public accounts preparation and accruals)	SO	6y	DE
-----	---	----	----	----

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

1180      PERIOD-END FINANCIAL REPORTING AND ANALYSIS (continued)

SO =    when no longer required for analysis, review, or  
         consultation

NOTE: This secondary covers the detail and backup  
documentation that supports the reports classified  
under secondary -20.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1190 REVENUE CONTROL

Records relating to the analysis, review, and reconciliation of recoverable amounts, potential revenues, cost recoveries, and amounts credited to suspense accounts.

Record types include correspondence, spreadsheets, reports, and forms.

For accounts receivable, see secondary 935-20.

For cost-sharing arrangements, see primary 950.

For fee schedules and rates, see primary 1120.

For journal vouchers, see secondary 1050-04.

For revenue estimates, see primary 1000.

For revenue programs, see the *ORCS* of the relevant program area.

For revenue reporting, see primary 1180.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	7y	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

-20	Revenue and recoverable amount control files (covers revenue and suspense accounts, recoverable amounts, and cost recoveries)	FY+1y	6y	DE
-----	--	-------	----	----

NOTE: For administrative convenience, these records may be classified with other financial analysis and reconciliation files under secondary 920-20.

NOTE: The reporting of actual and projected revenue is classified under primary 1180 with other period-end reports.



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1210 TAX REPORTING

Records relating to ministry and agency reporting of taxable payments, customs and excise duties and taxes, and Goods and Services Tax (GST) and Provincial Sales Tax (PST) included in ministry/agency billings.

Record types include correspondence, tax summaries and slips, returns, forms, cheque requisitions, and reports.

For accounts payable, see secondary 925-20.

For agreements, see primary 146.

For payroll remuneration reporting (i.e., T4 remittances), see the records of Payroll Services.

For provincial taxation programs, see the *ORCS* of the relevant program.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01 General

PIB

-02 Taxable payment reporting  
(includes T4A's)

CY+1y      6y      DE

8y = The retention period ensures that these records are available to taxation authorities, which have the right under the *Income Tax Act* (RSC 1985, c. I-5, ss. 230(4) and 231.1) to investigate income tax returns filed for the previous six years.

-03 Consumption tax reporting  
(covers GST and PST in ministry/agency billings)

FY+1y      6y      DE

8y = The retention period is based on the six-year records retention requirements for GST reporting under the *Excise Tax Act* (RSC 1985, c. E-15, s. 286[3]).

NOTE: For administrative convenience, batched GST and PST reporting records may be classified with financial transaction batches under primary 1050.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1210      TAX REPORTING (continued)

-05      Customs and excise duty and tax reporting      FY+1y      6y      DE

8y =      The retention period satisfies the six-year records retention requirements under the *Excise Act, 2001* (Statutes of Canada 2002, c. 22, s. 206[7]) and the *Imported Goods Records Regulations* (SOR/86-1011, s. 2).

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1240 TRAVEL AUTHORIZATION

Records relating to travel authorization and expense claims.

Record types include correspondence, forms, and receipts.

For accountable travel advances, see primary 940.

For reassignments and transfers, see primary 1385 (individual employee) and primary 1580 (staffing projections and planning).

For travel cards, see primary 1105.

For travel plans, itineraries, etc., see primary 490.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO      7y      DE

- non-OPR

SO      nil      DE

-01 General

PIB

-05 Denied travel requests

PIB

-20 Travel authorization files

FY+1y      6y      DE

(covers relocation expense claims, minister's travel expenses, -non-government personnel, in-province travel, out-of-province travel, and out-of-Canada travel) (includes approved travel requests, expense claim records [e.g., iExpense envelopes], and business travel emission [e.g., SMARTTEC] confirmations)

NOTE: For administrative convenience, these records may be classified with other accounts payable records under either primaries 925 or 1050, whichever is consistent with local office practice.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1250      TREASURY BOARD SUBMISSIONS

Records relating to ministry and agency submissions prepared for Treasury Board approval, except for budget presentations and submissions.

Record types include correspondence, working papers, reports, briefing notes, and orders in council.

For approved spending authorized by Treasury Board, see secondary 1000-20.

For budget presentations and submissions to Treasury Board, see secondary 1000-20.

For cabinet submissions, see primary 201.

For Treasury Board orders and directives, see primary 195.

Unless otherwise specified below, the ministry or agency OPR ( ) will retain these records for:

FY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

7y

FR

- non-OPR

SO

nil

DE

FR = Treasury Board Submissions policy and procedures will be fully retained by the government archives because they document ministry/agency-specific policy, procedures, guidelines, and instructions regarding the Treasury Board submission process. The records have significant evidential and informational value.

-01      General

DE = Treasury Board Submissions - general can be destroyed upon authorization by the Records Officer because ministry/agency-specific policy, procedures, and guidelines are fully retained by the government archives from secondary -00 and Treasury Board submissions are retained by Treasury Board Staff, Deputy Secretary to Treasury Board.

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[Key to ARCS/ORCS Codes and Acronyms](#)

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

DE = Treasury Board submission files can be destroyed upon authorization of the Records Officer because ministry/agency-specific policy, procedures, and guidelines are fully retained by the government archives from secondary -00 and Treasury Board submissions are retained by Treasury Board Staff, Deputy Secretary to Treasury Board.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### SECTION 5

#### HUMAN RESOURCE MANAGEMENT

##### PRIMARY NUMBERS

1300 - 1999

Section 5 covers records relating to human resource (HR) management activities performed by provincial government ministries and agencies that use the HR services of the British Columbia Public Service Agency (BCPSA) and the payroll services of TELUS Sourcing Solutions (TSS)-BC. This includes records relating to: employee supervision, leave and time reporting, job description preparation, job classification requests, staffing and recruitment, employer-employee relations, ministry recognition programs, occupational safety and health activities, and ministry training course development and delivery.

Agencies with their own internal human resources and payroll services should use the *Human Resources ARCS Supplement (HRAS)*. The exceptions are BC Emergency Health Services and Liquor Distribution Branch, who should use the *Emergency Health Services ARCS Supplement* and the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### SECTION 5

#### 1300 - HUMAN RESOURCE MANAGEMENT - 1999

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[Key to ARCS/ORCS Codes and Acronyms](#)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1300 HUMAN RESOURCE MANAGEMENT - GENERAL

Records not shown elsewhere in the human resource (HR) management section which relate generally to HR management activities performed by provincial government ministries and agencies that use the HR services of the British Columbia Public Service Agency (BCPSA) and the payroll services of TELUS Sourcing Solutions (TSS)-BC on behalf of Provincial Human Resource Management System (HRMS) Partnership Branch.

Record types include correspondence and reports.

NOTE: This section is designed for ministries and agencies served by BCPSA and TSS-BC. Agencies with their own internal human resources and payroll services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

For ministry-specific HR initiatives and strategies, see secondary 400-20.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

DE = HR management policies and procedures are developed by BCPSA and retained by the government archives in the *Public Service Personnel Management ORCS*.

-01 General

-06 Human resource topical files

SO

nil

DE

(arrange by subject [e.g., human rights, employment equity, job enhancement, and women's issues])

### [Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1310      AWARDS AND RECOGNITION

Records relating to programs that award and recognize employee contributions to improvements in service, operations, and the work environment.

Record types include correspondence, applications, evaluation and approval forms, and reports.

NOTE: This primary is designed for ministries and agencies that participate in employee recognition programs developed and administered by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For ceremony planning, see secondary 220-20.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO      nil      DE

- non-OPR

SO      nil      DE

-01      General

-05      Award and recognition program information files  
(arrange by program if volume warrants)

SO      nil      DE

NOTE: This secondary covers general information about BCPSA developed award programs (e.g., Premier's Innovation and Excellence Awards, Improvement Awards, Staff Appreciation Awards, Long Service Awards, Public Service Week) as well as ministry-specific recognition programs (e.g., five-year service recognition awards and ministry receptions in support of the Long Service Awards Program).

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

1310      AWARDS AND RECOGNITION (continued)

PIB	-50	Award and recognition applicant/recipient files (arrange by program and/or employee, if volume warrants)	SO+1y	nil	DE
-----	-----	---	-------	-----	----

SO = when decision is rendered, and if relevant, upon conclusion of appeal periods and appeals

NOTE: Improvement Awards Program (IAP) decisions may be appealed to the IAP program manager within 90 days of the decision. Employees retain the right to recognition for their IAP ideas for one year after receiving notice that their ideas are declined.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1315 BENEFITS

Records relating to the provincial government's comprehensive benefits package (e.g., health and disability benefits, employment insurance, workers' compensation, life insurance, retirement and pension benefits, employee and family counseling services, and salary and retirement savings plans).

Record types include correspondence, manuals, and reports.

NOTE: This primary is designed for ministries and agencies that use the benefit services provided by the BC Public Service Agency (BCPSA) and TELUS Sourcing Solutions (TSS)-BC. Agencies with their own internal human resources and payroll services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-05	Benefit plan information files (arrange by specific benefit [e.g., life insurance, medical, and pension] if volume warrants)		SO	nil	DE
-----	---	--	----	-----	----

NOTE: This secondary covers general information about each benefit plan.

### [Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1360      JOB DESCRIPTION AND CLASSIFICATION

Records relating to the preparation of job descriptions, as well the submission of position classification and reclassification requests, including classification appeals to the BC Public Service Agency (BCPSA).

Ministry managers are responsible for defining their employees' duties and responsibilities in job descriptions and submitting approved job descriptions for classification to BCPSA. BCPSA is the office of record for approved, signed job descriptions.

Record types include correspondence, job descriptions, job evaluation plans, benchmarks, appeal notices, and forms.

NOTE: This primary is designed for ministries and agencies that use the classification services provided by BCPSA. Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use HRAS. For guidance, please contact your Records Officer.

For the delegation of classification authority, see primary 265.  
For ministry organization, see primary 105.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-04      Job classification research files

SO

nil

DE

(includes job evaluation plans and benchmarks)

NOTE: This secondary includes relevant job evaluation plans (also known as classification plans) and benchmarks obtained from BCPSA, and may include the research and rationale behind the ministry's classification and reclassification requests and classification appeal submissions.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
1360	<u>JOB DESCRIPTION AND CLASSIFICATION</u> (continued)			
-20	Job description and classification/appeal files (formerly known as position history files) (arrange by position or generic job title)	SO	nil	SR
	SR = The government archives will selectively retain position history files because they document functions and activities of positions in the civil service and contribute to an understanding of how the functions of the government are carried out.			
	Files closed prior to the creation of the BCPSA on April 1, 2003 will be selectively retained by retaining generic job descriptions of operational positions, and generic descriptions of significant administrative positions. Files that document other administrative positions and individual job classification/appeal files will be destroyed. As well, all files classified under this secondary since April 1, 2003 will be destroyed because they duplicate information retained from the BCPSA.			
	NOTE: Although certain positions may be delegated to senior ministry/agency managers for classification approval, approved, signed job descriptions are sent to BCPSA for filing on the position files.			

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1385      EMPLOYEE SUPERVISION AND DEVELOPMENT

Records relating to the day-to-day supervision and development of employees (including volunteers) at the worksite. This includes the management of employees on sick leave and their return to work, as well as investigations of alleged employee misconduct.

Record types include correspondence, employee performance and development plans (EPDPs), applications, forms, agreements, reports, and photographs.

NOTE: The official employee personnel file is held by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For Article 29 committees, see secondary 200-20.

For complaints, disputes, and grievances, see secondary 1480-20.

For criminal record check consent forms, see secondary 1665-04.

For executive leadership development applications, see secondary 1705-02.

For personal protective equipment fit tests, see secondary 1560-08.

For training course development and delivery, see primary 1735.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures      - OPR      SO      nil      DE

- non-OPR      SO      nil      DE

-01      General

PIB      -20      Branch employee files  
(arrange by surname)      SO      nil      DE

SO = when no longer required by manager/supervisor or upon expiry of retention periods stipulated in the collective agreement (e.g., disciplinary records)

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### 1385      EMPLOYEE SUPERVISION AND DEVELOPMENT (continued)

NOTE: The official employee personnel file is held by BCPSA, but supervisors/managers may retain certain job-specific records. They may include confirmation/verification of employment records, copies of job descriptions, agreements to work different hours, time and leave reporting records, approved vacation requests, EPDPs and related training and development information, investigations of alleged misconduct, relocation information, ergonomic assessments and related letters to employees, building access information, exit interviews, and return to work plans for employees on health-related absences.

NOTE: When EPDPs or equivalent plans are used as an appraisal form signed by the employee and supervisor, a copy is sent to BCPSA for filing on the employee's personnel file.

NOTE: Employee training information is recorded on the Corporate Human Resource Information and Payroll System (CHIPS), which is maintained by BCPSA.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1480 EMPLOYER-EMPLOYEE RELATIONS

Records relating to employer-employee relations within ministries. This includes ministry-specific strike contingency planning, the determination of essential service levels in the event of job action, and the resolution of disputes, complaints, and misunderstandings with employees, including those that are subject to the grievance procedures in the collective agreement or covered by policy directives (e.g., the dispute resolution process for excluded employees and discrimination and personal and sexual harassment complaints).

Record types include correspondence, forms, reports, and plans.

NOTE: The official labour relations and formal complaint and dispute resolution files are held by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Strike planning		SO	nil	DE
-03	Essential service planning		SO	nil	DE
-04	Collective bargaining preparation		SO	nil	DE

PIB	-20	Dispute/complaint resolution files (covers individual grievance files and hHours of work - umpire's report) (arrange by employee surname)	SO	7y	DE
-----	-----	--	----	----	----

SO = upon resolution of dispute or complaint, and when no longer required by manager/supervisor

7y = The six-year limitation period specified in the *Limitation Act* (RSBC 1996, c. 266, s. 3) serves as the guideline in establishing the semi-active retention period for these files.

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[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### 1480      EMPLOYER-EMPLOYEE RELATIONS (continued)

NOTE: This secondary covers misunderstandings, complaints and disputes resolved by manager/supervisors or other responsible ministry officials, and may include copies of records relating to grievances and other disputes and complaints handled by BCPSA.

The collective agreement provides for grievance procedures for bargaining unit employees with respect to "grievable" disputes (e.g., discipline or discharge of a bargaining unit employee by the employer or from a disagreement over interpretation of some part of the collective agreement). If the grievable dispute cannot be resolved orally with the employee's supervisor (step 1), the employee may submit a formal written grievance through the union to the employer's authorized representative (step 2). Step 2 grievances, as well as grievance arbitrations are handled by BCPSA.

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[Key to ARCS/ORCS Codes and Acronyms](#)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1550 LEAVE AND TIME REPORTING

Records relating to reporting and approving employee attendance.

Most BC Government employees report their time worked and leave taken on an automated time and leave reporting system. However, paper timesheets and leave forms may be used for employees with irregular work schedules (e.g., shift or on call workers) and electronic forms are used to approve employee additions to base pay after the payroll deadline.

Record types include correspondence, forms, reports, and copies of timesheets and leave forms.

NOTE: The official employee pay files and leave and time reporting records are held by TELUS Sourcing Solutions (TSS)-BC. Agencies with their own internal payroll services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For gross pay over \$10,000 reports, see primary 1100.

For payroll expenditure reports, see primary 1100.

For recovery of salary dollars from employee transfers, see primary 1190.

For write-offs of uncollectible salary overpayments, see primary 935.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01 General

PIB -30 Branch or field office leave/time reporting files  
(arrange by employee surname)

SO

nil

DE

SO = when no longer required by current manager/  
supervisor

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

1550      LEAVE AND TIME REPORTING (continued)

NOTE: For administrative convenience, these records may be classified on the relevant branch employee file under secondary 1385-20, rather than under this secondary.

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[Key to ARCS/ORCS Codes and Acronyms](#)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1560 OCCUPATIONAL SAFETY, HEALTH, AND ACCIDENTS

Records relating to promoting safe and healthy workplaces, as well as treating, reporting, and investigating accidents, injuries, and diseases that result directly from work duties pursuant to the *Workers Compensation Act* (RSBC 1996, c. 492, part 3) and *Occupational Health and Safety Regulation* (BC Reg. 296/97). This includes ministry and local worksite occupational safety and health (OSH) program planning, ergonomic assessments, first aid needs assessments, hazardous materials testing, incident reporting, and safety inspections.

Record types include correspondence, forms, reports, and other types of records as indicated under relevant secondaries.

NOTE: This primary is designed for ministries and agencies that use the OSH and disability management services provided by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For information about the disposal of hazardous material, see primary 500-03.

For emergency plans and procedures, see primary 275.

For joint employer/union health and safety committee, see primary 200.

For return to work plans, see secondary 1385-20.

Unless otherwise specified below, the ministry or agency OPR (ministry OSH coordinator or equivalent) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00 Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01 General

PIB

-02 Ergonomic assessments

SO

nil

DE

SO = when replaced by new assessment or when employee no longer works at the jobsite

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1560      OCCUPATIONAL SAFETY, HEALTH, AND ACCIDENTS (continued)

NOTE: This secondary covers routine ergonomic assessments performed by ministry OSH coordinators or equivalent ministry staff. Ergonomic assessments performed by occupational health practitioners are on the employee's health file held by the BC Public Service Agency.

NOTE: For administrative convenience, these records may be classified on the relevant branch employee file under secondary 1385-20, rather than under this secondary.

-03      First aid needs assessments      SO      nil      DE

SO = when replaced by new assessment in accordance with *Occupational Health and Safety Regulation* (s. 3.16)

NOTE: Pursuant to *Occupational Health and Safety Regulation* (s. 3.16), risks and hazards must be identified in worksites "within 12 months after the previous assessment or review and whenever a significant change affecting the assessment occurs in the employer's operations".

PIB      -04      First aid treatment books      SO      7y      DE

SO = upon conclusion of first aid care, and when book is closed

7y = The seven-year retention period satisfies the minimum three-year retention period for first aid treatment records specified under the *Occupational Health and Safety Regulation* (part 3.19) and is consistent with the retention period for the joint health and safety committee files classified under secondary 200-20.

NOTE: These records document work-related incidents that result in first aid treatment. Serious injuries, including exposure to contaminants, are reported to WorkSafe BC (formerly the Workers' Compensation Board [WCB]) on incident investigation reports classified under secondary -20.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
1560	<u>OCCUPATIONAL SAFETY, HEALTH, AND ACCIDENTS</u> (continued)			
-05	Hazardous material information (includes Material Safety Data Sheets [MSDS])	SO	nil	DE
	SO = when replaced by new information			
	NOTE: If controlled products are used in the workplace, a Workplace Hazardous Materials Information System (WHMIS) program must be established. <i>Occupational Health and Safety Regulation</i> (part 5) requires that MSDSs be updated at least every three years and that WHMIS programs be reviewed at least annually.			
-06	OSH inspection files	SO	7y	DE
	SO = upon conclusion of inspection and if relevant, upon implementation of corrective measures			
	7y = The seven-year retention period is consistent with the retention period for the joint health and safety committee files classified under secondary 200-20.			
	NOTE: This secondary covers inspections to ensure compliance with the <i>Occupational Health and Safety Regulation</i> .			
	NOTE: For administrative convenience, these records may be classified on the joint health and safety committee file under secondary 200-20, rather than under this secondary.			
-07	OSH program information	SO	nil	DE
	NOTE: This secondary covers ministry and local worksite OSH program information (e.g., roles and responsibilities and instructions).			
-08	Personal protective equipment information	SO	nil	DE
	SO = upon completion of next annual review			

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1560      OCCUPATIONAL SAFETY, HEALTH, AND ACCIDENTS (continued)

NOTE: *Occupational Health and Safety Regulation* (part 8) requires that personal protective equipment programs be reviewed annually and that equipment fit tests be repeated at least annually

PIB      -09      Refusal to work because of unsafe conditions      SO      7y      DE

SO =    upon conclusion of investigation, and if relevant, upon implementation of corrective measures

7y =    The seven-year retention period is consistent with the retention period for the OSH inspection files classified under secondary -06.

PIB      -20      Work-related incident reporting files      SO      7y      DE  
(covers WCB claim correspondence claim investigations and exposure to hazardous materials case files)  
(includes accident and incident reports (e.g., joint accident investigation form [PSA 38]), employer's report of injury or occupational disease [WCB form 7], first aid report [WCB form 7A], and may include worker's report of injury or occupational disease to employer [WCB form 6a])  
(arrange by employee surname)

SO =    upon adjudication of claim by WorkSafe BC, and if relevant, upon implementation of corrective measures

7y =    The seven-year retention period is consistent with the retention period for the first aid treatment records classified under secondary -04.

NOTE: These records document work-related incidents that result in death, time loss, or medical attention or have the potential of causing serious injury to a worker or involve a major structural failure or exposure to hazardous or bio-hazardous substances (e.g., asbestos and avian influenza viruses). These incidents must be reported to WorkSafe BC even if a claim is not anticipated.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

1560      OCCUPATIONAL SAFETY, HEALTH, AND ACCIDENTS (continued)

NOTE: If the injury or accident results in time loss or health care costs, copies of the WCB form 7, WCB form 7A, and WCB form 6a must be sent to BCPSA for filing on the employees' personnel file.

NOTE: Appeals of WorkSafe BC claim decisions are handled by BCPSA, as are disability case management and return to work planning for ill and injured employees.

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[Key to ARCS/ORCS Codes and Acronyms](#)



# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1580      STAFFING PROJECTIONS AND PLANNING

Records relating to ministry staffing projections and planning, including staff reductions and surpluses resulting from workforce adjustment and voluntary exit programs.

Record types include correspondence, surveys, and reports.

NOTE: This primary is designed for ministries and agencies served by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For budget planning, see primary 1000.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

-04	Seniority, recall, and vacancy lists		SO	nil	DE
-----	--------------------------------------	--	----	-----	----

NOTE: Eligibility lists are classified under secondary 1665-20.

-05	Staffing requirements planning files		SO	nil	DE
-----	--------------------------------------	--	----	-----	----

NOTE: This secondary includes FTE planning and utilization, staff requisitions, pre-retirement and succession planning, priority placements, and workforce adjustment and planning.

### [Key to ARCS/ORCS Codes and Acronyms](#)

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1665      STAFFING, RECRUITMENT, AND COMPETITIONS

Records relating to the staffing of positions, including recruitment of employees and competitions for vacant positions.

Record types include correspondence, forms, reports, and other types of records as indicated under relevant secondaries.

NOTE: This primary is designed for ministries and agencies served by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use HRAS. For guidance, please contact your Records Officer.

For branch employee files, see secondary 1385-20.

For direct recruitment, including appointments, see secondary 1385-20.

For executive leadership development and advancement, see secondary 1705-02.

For job descriptions, see secondary 1360-20.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General  
)

-03	Model interview questions		SO	nil	DE
-----	---------------------------	--	----	-----	----

-04	Criminal record check consent forms (not hired)		CY	5y	DE
-----	---	--	----	----	----

6y =      The retention period satisfies the five-year retention period required by Royal Canadian Mounted Police (RCMP) Canadian Police Information Centre (CPIC) auditors for the retention of *Criminal Records Review Act* (RSBC 1996, c. 86) consent forms.

NOTE: This secondary covers unsuccessful applicants' consent forms for record checks under the *Criminal Records Review Act* and *Public Service Act Directive 3.6 Police Record Checks*.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

1665      STAFFING, RECRUITMENT, AND COMPETITIONS (continued)

NOTE: Consent forms of successful job applicants are sent to BCPSA for filing on the relevant employee personnel file.

NOTE: As required by part D of *Public Service Act Directive 3.6 Police Record Checks*, ministries are required to destroy or return all police documentation to job applicants, including the results of police record checks, and eliminate all references that identify applicants with criminal records. Therefore, police record check consent forms should only indicate that a check has been undertaken.

-05      Selection standards reference material      SO      nil      DE

NOTE: This secondary covers a reference collection of standard qualifications for public service positions, which are developed by BCPSA.

-06      Student recruitment/selection information      SO      nil      DE

NOTE: This secondary includes co-op, articling, intern, and summer student recruitment information. When students are hired, their employment records are sent to BCPSA for filing on their employee personnel files. Copies may be maintained by their supervisors on the branch employee file under secondary 1385-20.

PIB      -07      Unsolicited offers of service - not considered  
(includes résumés)      SO      nil      DE

NOTE: This secondary covers unsolicited résumés and similar personal offers of service that were not considered. Applications and résumés of applicants under consideration are classified under secondary -20.

-20      Staffing competition files  
(includes correspondence, applications, résumés, job descriptions, posting request forms, job postings, eligibility lists, and tests)  
(arrange by competition)      SO+2y      nil      DE

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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A      SA      FD

### 1665      STAFFING, RECRUITMENT, AND COMPETITIONS (continued)

SO = upon the date the successful applicant is placed into new position (i.e., the effective date of the appointment), and if an eligibility list or inventory has been established, when the list has been exhausted or the term of the list has expired, whichever is earlier

2y = The two-year retention period satisfies the audit requirements of the Office of the Merit Commissioner.

NOTE: These files include candidates' qualifications, scores, and test results, competition assessment tools including criteria and rating methodology, copies of approvals or waivers for special considerations or restrictions, reference check procedures and ranking guides, decisions, copies of offer letters, and letters of regret and feedback to unsuccessful candidates.

NOTE: Original applications and résumés of successful candidates are sent to BCPSA for filing on the relevant employee personnel file. Copies are retained on the competition files.

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

Section 5 - 24

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1705      STRATEGIC HUMAN RESOURCE PLANNING AND ADVICE (continued)

NOTE: This secondary covers the ministry's selection of candidates for development and advancement into more senior leadership roles (i.e., director, executive director, deputy ministry, or assistant deputy minister). The final decision is made by BCPSA.

-20	Strategic HR planning and advice project files (arrange by project)	SO	2y	DE
-----	--	----	----	----

SO = when project is completed, closed, or cancelled, and when no longer required for reference purposes

2y = The two-year retention period provides sufficient time to ensure these files are no longer required.

# ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

## 1730      TRAINING AND DEVELOPMENT - GENERAL

Records relating to ministry-specific employee training and professional development not shown elsewhere in this primary block.

Record types include correspondence and reports.

NOTE: This primary is designed for ministries and agencies served by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For training budget, see primary 1000.

For training initiatives (e.g., mentoring), see secondary 400-20.

For the training records of individual employees, see the Corporate Human Resource Information and Payroll System (CHIPS).

For training topical files, see secondary 1300-06.

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-03      Educational leave criteria

SO

nil

DE

-04      Employee orientation information

SO

nil

DE

-05      Career development paths

SO

nil

DE

-06      Training and skills needs analysis

SO

nil

DE

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1735      TRAINING AND DEVELOPMENT - COURSE DELIVERY

Records relating to the development and delivery of ministry training sessions, workshops, courses, and information sessions.

Record types include correspondence, instructor's notes, presentation slides, handouts, course workbooks and manuals, class lists, and evaluation forms.

NOTE: This primary is designed for ministries and agencies served by the BC Public Service Agency (BCPSA). Agencies with their own internal human resources services should use the *Human Resource ARCS Supplement (HRAS)*, the *Emergency Health Services ARCS Supplement*, or the *Liquor Distribution ARCS Supplement*. Agencies must be registered to use *HRAS*. For guidance, please contact your Records Officer.

For the training records of individual employees, see the Corporate Human Resource Information and Payroll System (CHIPS).

Unless otherwise specified below, the ministry or agency OPR (responsible line managers) will retain these records for:

CY+1y      nil      DE

Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	<u>SO</u>	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-03      Training evaluations      SO      nil      DE

-05      Training packages      SO      2y      SR

SR = The government archives will selectively retain training packages because they document the training process for civil servants as well as the functions and activities of positions in the civil service, and contribute to an understanding of how the functions of the government are carried out.

The files will be selected by retaining training packages for significant operational functions and positions. All other training packages will be destroyed.

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A      SA      FD

### 1735      TRAINING AND DEVELOPMENT - COURSE DELIVERY (continued)

NOTE: This secondary covers the final version of instructor's/ facilitator's notes, presentation slides, handouts, and participant workbooks and manuals. The development of this material is covered by secondary -20.

-20	Training development files (arrange by course name)	SO	2y	DE
-----	--	----	----	----

-25	Training implementation history files (arrange by course name)	SO	2y	DE
-----	---	----	----	----

NOTE: This secondary covers course requests and information relating to the implementation history of particular courses, including facilities, aids, and resources used.

-30	Training session attendance files (arrange by course, then by delivery date)	SO	nil	DE
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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### SECTION 6

#### INFORMATION TECHNOLOGY

#### PRIMARY NUMBERS

6 0 0 0 - 6 9 9 9

Section 6 covers records relating to information management/information technology (IM/IT) responsibilities of B.C. government ministries and agencies in compliance with the policies and standards of the offices of the Chief Technology Officer and Chief Information Officer. This includes records relating to ministry/agency development and operation of their own computer applications, telecommunication networks, and radio communication systems.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

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A      SA      FD

### SECTION 6

6000 - INFORMATION TECHNOLOGY - 6999

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6000	INFORMATION TECHNOLOGY - GENERAL
6450	INFORMATION SYSTEM DEVELOPMENT AND CHANGES
6820	INFORMATION SYSTEM OPERATIONS
6840	CHANGE MANAGEMENT
6880	TELECOMMUNICATION NETWORK MANAGEMENT
6890	RADIO COMMUNICATION

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6000      INFORMATION TECHNOLOGY - GENERAL

Records not shown elsewhere in the information technology section which relate generally to information management/information technology (IM/IT) responsibilities of B.C. government ministries and agencies in compliance with the policies and standards of the offices of the Chief Technology Officer and Chief Information Officer.

Record types include correspondence, forms, and reports.

NOTE: Only records that cannot be classified in a more specific primary or secondary may be classified under this primary.

For IM/IT product research and technological innovations, see secondary 737-25.

For IM/IT projects, see 6450-20.

For IM/IT security, see primary 470.

For IM/IT strategic planning and related plans (e.g., information resource management plans), see secondary 400-20.

For knowledge management, see secondary 400-20.

For orders (e.g., Oracle iStore), see primary 825.

For userIDs, see primary 470.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-02      IM/IT standards

SO

nil

DE

(covers computer systems technology standards, system development standards, draft system development standards, and change management standards)

DE = IM/IT standards can be destroyed because IM/IT standards are adequately documented in records retained from the Office of the Chief Information Officer, the Chief Technology Office, and Workplace Technology Services.

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

		<u>A</u>	<u>SA</u>	<u>FD</u>
6000	<u>INFORMATION TECHNOLOGY- GENERAL</u> (continued)			
-03	IM/IT subject files (covers office automation, new technology, environmental concerns, electronic data interchange [EDI], and related topics)	SO	nil	DE
-20	IT service request authorization (covers requests for information technology services [RFS], telecommunications service requests, and requests for radio communication services)	SO	2y	DE
	SO = upon approval by expense authority or cancellation			
	NOTE: Classify IT orders (e.g., Oracle iStore orders) under primary 825. Classify user ID authorizations under primary 470.			

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6450      INFORMATION SYSTEM DEVELOPMENT AND CHANGES

Records relating to the planning, business analysis, development, and implementation of new ministry/agency computer-based information systems (e.g., software applications, computer networks, and web sites), as well as changes and enhancements to existing ministry/agency information technology.

Record types include correspondence, business process diagrams and models, project charters, business cases, feasibility studies, minutes, technical documentation, application release acceptance records, records of decisions, data dictionaries, and reports.

For contract procurement and contract management, see primary 1070.

For copyright and other intellectual property records, see primary 345.

For non-IT related business analysis, see secondary 400-20.

For operations and maintenance, see primary 6820.

For security threat and risk assessments, see primary 470.

For software and hardware inventories, see primary 737.

For software licences and agreements, see primary 737.

For systems security control documentation, see primary 470.

For training, see primary 1735.

For web site content planning and development, see primary 340.

For workstation refresh projects, see secondary 400-40.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures      - OPR      SO      nil      DE

- non-OPR      SO      nil      DE

-01      General

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6450      INFORMATION SYSTEM DEVELOPMENT AND CHANGES (continued)

-20      IT projects      SO      2y      DE  
(arrange by project and then, if desired, by phase)  
(covers project documentation relating to all phases of information technology projects, such as: corporate information models, data sharing and integration, data administration, design, development, maintenance plans, network development, post-implementation audits and reviews, requirements definition, systems documentation, and test implementation)

SO = upon project completion, cancellation, or abandonment and when no longer required for reference

DE = IT project files can be destroyed, upon authorization of the Records Officer, because significant documentation is selectively retained from 6450-80, as well as under executive records covered by primary 280 and/or by special schedule 102906.

-80      IT application/system documentation - final versions      SO      2y      SR  
(covers user guides, code repositories, data dictionaries, technical design documentation, support manuals, application-specific troubleshooting guides, application management procedures, backup schedules, and documentation of steering committee and other governance decisions)

SO = upon completion of post implementation review, or when project is abandoned, and when no longer required for reference

SR = After the final versions of system documentation reach the final disposition phase, a government archivist will select significant files, i.e., mainly files containing documentation that relates to systems governance decisions and/or systems retained for the archives.

NOTE: Classify the development of this documentation (including significant drafts) under secondary -20.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6820      INFORMATION SYSTEM OPERATIONS

Records relating to the operation of ministry/agency computer-based information systems. This involves day-to-day maintenance, including data administration, database management, backups and recoveries, reported incidents, problem management, user help and support, program bug identification and fixes, and application and system performance monitoring.

Record types include correspondence, logs, reports, and backup storage media (e.g., magnetic tapes, optical disks, and memory sticks).

For data in databases and systems, see the relevant *ARCS* or *ORCS* secondary.

For disaster recovery plans, see primary 275.

For information system development, see primary 6450.

For security, see primary 470.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	FR
	(covers file backup procedures)	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01      General

-05	Backup data		SO	nil	DE
	(covers copies of data created for the sole purpose of restoring data after a system failure or disaster)				

SO = when no longer required for system recovery, and in accordance with the established backup cycle for the application or system

(continued on next page)

[Key to ARCS/ORCS Codes and Acronyms](#)



## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6820 INFORMATION SYSTEM OPERATIONS (continued)

NOTE: Backup storage media must be re-used, destroyed or data previously recorded on the medium erased in accordance with the provincial government's asset disposal standards (e.g., *IT Asset Disposal Standard*) and backup and recovery policies and procedures (e.g., *Core Policy and Procedures Manual* chapter 8.3.2 and internal ministry/agency policies and procedures).

-06	Log files (includes application, server, web site, system, audit, event, and equivalent logs)	SO	nil	DE
-----	--	----	-----	----

SO = when no longer required

NOTE: Classify logs monitored by security staff and/or relevant to security investigations under primary 470. Classify logs documenting compliance with vendor agreements with the related contract under primary 1070.

-20	Information system maintenance records (covers maintenance plans, disk space management, tape space management, system capacity planning, maintenance of local, shared and external applications, job control language reports, maintenance reports, status reports system response time reports, system usage/activity reports, billing information system reports, labour detail reports, disk space usage reports, tape space usage reports, and tape library usage reports)	SO	2y	DE
-----	--	----	----	----

SO = when no longer required to support the application, server, or system

-25	Reported incidents and user help and support (covers end user service statistics, help desk alerts/exception reports, and incident reports)	SO	2y	DE
-----	--	----	----	----

SO = upon resolution of incident or provision of help and support, and when no longer required to support the application, server, or system

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 6840      CHANGE MANAGEMENT

Records relating to the centralized control and approval of changes to ministry/agency information technology (IT).

Records types include correspondence, forms, and reports.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00      Policy and procedures

- OPR

SO

nil

DE

- non-OPR

SO

nil

DE

-01      General

-20      IT change management records  
(covers change requests, change management issues, maintenance items, and next release items)

SO+2y

nil

DE

SO = when the relevant release has been implemented

NOTE: Alternatively for administrative convenience, these records may be classified with the relevant project under secondary 6450-20.

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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A      SA      FD

### 6880      TELECOMMUNICATION NETWORK MANAGEMENT

Records relating to the management of internal ministry/agency telecommunication networks (e.g., voice and data networks) and network site installations, as well as the provision of “telework” infrastructure services (e.g., telecommuting, teleconferencing, and videoconferencing technical support).

Records types include correspondence and reports.

For contract procurement and management, see primary 1070.

For employee telecommuting arrangements with supervisors, see primary 1385.

For telecommunication network capacity and performance management, see primary 6820.

For telecommunication network change management approvals, see primary 6840.

For telecommunication network development projects, see primary 6450.

For telecommunication network devices (e.g., routers and switches), see primary 700.

For telecommunication network product research, see secondary 700-20.

For service requests, see secondary 6000-20.

For telephones and other telecommunication devices, see primary 700.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
-----	-----------------------	-------	----	-----	----

		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
--	--	------------------	-----------	------------	-----------

-01	General				
-----	---------	--	--	--	--

-05	Telework services		SO	nil	DE
-----	-------------------	--	----	-----	----

(covers the technical aspects of providing teleconferencing, videoconferencing, telecommuting and other telework services)

SO = upon completion or cancellation of service, and when no longer required for reference purposes

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
6880	<u>TELECOMMUNICATION NETWORK MANAGEMENT</u> (continued)			
-09	Voice mail management records (covers voice mail management records, digitized audio and non-audio records such as user passwords, pre-recorded personal greetings, voice mail distribution lists, and user identifications)	SO	nil	DE
	SO = when no longer required			
-20	Telecommunication network management (covers voice and data network engineering, network sites, network configurations, inventory of communication lines, FAX monthly reports, local area networks, metropolitan area networks, voice networks, wide area networks, and interruption of service)	SO	2y	DE
	SO = when technical information is updated, and when network and/or network site no longer exists			

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6890      RADIO COMMUNICATION

Records relating to ministry/agency land-based radio communication systems, including the installation and maintenance of radio repeaters (i.e., radio receivers and transmitters such as radio base stations and radio towers) and the issuance of radio frequency licences.

Records types include correspondence, radio logs, licences, maps, diagrams, and reports.

For marine radio communication and marine radio logs, see primary 877.

For memoranda of understanding (MOUs) and other agreements, see primary 146.

For radiotelephones, see primary 700.

Unless otherwise specified below, the ministry or agency OPR (computing services branch or equivalent) will retain these records for:

FY+2y      nil      DE

Except where non-OPR retention periods are identified below, all other offices will retain these records for:

SO      nil      DE

-00	Policy and procedures	- OPR	SO	nil	DE
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-03	Radio frequency licences		SO	7y	DE

SO = upon expiry of the licence

7y = The seven-year retention period is consistent with the retention period for all other licences classified in ARCS. It is based on the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

NOTE: These licences are issued by the federal government under the *Radiocommunication Act* (RSC 1985, c. R-2, s. 5) to authorize the use of specified radio frequencies within a defined geographic area.

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[Key to ARCS/ORCS Codes and Acronyms](#)

## ADMINISTRATIVE RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ARCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A      SA      FD

### 6890      RADIO COMMUNICATION (continued)

-50	Radio communication sites (covers base stations, repeaters, frequency interference, lightning protection, radio logs, use of frequencies/path profiles, radio communication systems, radio logs, and site installations [includes repeaters])	SO+1y	nil	DE
-----	--	-------	-----	----

SO = when site no longer exists, and when no longer required for reference purposes

-60	Radio communication specifications (covers radio specification history)	SO	nil	DE
-----	--	----	-----	----

SO = when no longer required

NOTE: These records document the requirements of the ministry/agency's radio communication system.