

PUBLIC SERVICE PERSONNEL MANAGEMENT SERVICES OPERATIONAL RECORDS CLASSIFICATION SYSTEM



GOVERNMENT RECORDS SERVICE

PUBLIC SERVICE PERSONNEL

MANAGEMENT

OPERATIONAL

RECORDS

CLASSIFICATION

SYSTEM



**Corporate Information
Management Branch**

Library and Archives Canada Cataloguing in Publication Data
British Columbia. Corporate Information Management Branch.

Public service personnel management services operational
records classification system

These records document the provision of personnel
management services to the BC Government as a whole,
including line managers, human resource practitioners, and
employees. Cf. Executive summary.

ISBN 978-0-7726-5905-7

1. BC Public Service Agency - Public records - Handbooks,
manuals, etc. 2. Administrative agencies - British
Columbia - Personnel management - Handbooks, manuals, etc.
3. Records retention - British Columbia - Handbooks,
manuals, etc. 4. Classification - Public records -
Handbooks, manuals, etc. I. Title.

JL429.5.P37B74 2008 352.6'3238709711 C2008-960008-8

OPERATIONAL 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 ORCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

PUBLIC SERVICE PERSONNEL MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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	FAAT	FIRST AID ASSESSMENT TOOL
	GTS	GRIEVANCE TRACKING SYSTEM
	LSARS	LONG SERVICE AWARD REGISTRATION SYSTEM
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ORCS REGISTER OF FORMAL AND ADMINISTRATIVE AMENDMENTS

This register lists all changes made to the *Public Service Personnel Management ORCS* and approved by either the Legislature (formal amendments) or the Public Documents Committee (PDC) Secretary (administrative amendments). Each amendment is uniquely identified as follows:

- **Formal amendments:** Schedule application number assigned to the amendment and used during the review and approval process conducted by the relevant ministry/agency, Records Management Operations (RMO), PDC, the Public Accounts Committee, and the Legislature; e.g., 123456.
- **Administrative amendments:** ADAM plus a registration number issued by Records Management Operations (RMO); e.g., ADministrative AMendment number thirty-eight is ADAM 38.

For administrative amendments policy and guidelines, see Recorded Information Management (RIM) policy entitled “Administrative Amendment of Approved Records Schedules” (CORP006) and *Standard ORCS Kit* chapter 3, section 3.3.

For more information about the changes listed here, see the relevant section, primary, and/or secondary; the *ORCS* may also have an appendix that provides a more detailed summary of changes.

Unique identifier (ADAM # or Schedule #)	Date Approved	Section/ Primary/ Secondary	Changes
170442	2023/10/24	Primary 57600	This amendment added one new secondary, closed two secondaries, and revises retention periods for three secondaries. It replaced a system overview and updated definition references.
ADAM 037	2013/02/05	Primary 57420	This administrative amendment divided the functions covered in secondary -30 in two to reflect new filing practices and facilitate the management of the records in TRIM. The new secondary is -45.
195773	2012/05/31	Primaries 57420 and 57480	This amendment adds three new secondaries and revises retention periods for three secondaries in primaries 57420 Employee Benefits - Disability Case Management and 57480 Employee Benefits - WCB Claim Appeals. See concordance table for full details.

This is an approved information schedule, as defined by the [Information Management Act \(SBC 2015, c. 27\)](#). For more information consult your [Government Records Officer](#).

Public Service Personnel Management Services Operational Records Classification System (ORCS)

Executive Summary for Amendment 4

Creating Agency

British Columbia Public Service Agency
Workplace Health and Safety
Occupational Health & Rehabilitation

Amendment Change Summary

Changes to primary 57600 and related system overview.

Scope

The purpose of this amendment is to update the retention periods for occupational health records and replace the occupational health database system overview. This amendment covers the following five changes to primary 57600:

1. Semi-active retentions were increased to reflect new retention requirements. This change increases the retention of 57600-03 Influenza vaccination forms (no health file) from seven to ten years, and both 57600-04 Pre-placement examinations (candidates not hired) and 57600-20 Employee health files (no exposure) from ten to sixteen years.
2. Replaces 57600-05 Sick leave paper forms (since April 2005) and 57600-06 Sick leave forms – digitized images with a broader 57600-07 Sick leave forms classification.
3. Updates language used throughout the primary to reflect business terminology.
4. Replaces the Occupational Health Management system overview with Cority.
5. References to the College of Physicians and Surgeons of BC in *Rules Made Under the Medical Practitioners Act* are replaced with the College of Physicians and Surgeons of BC in the *Health Professionals Act* (RSBC 1996, c.183) and WorkSafeBC's *Occupational Health & Safety Guidelines: G6.34-5 Record keeping requirements*, where applicable.

Date Range of Records

1900 - ongoing

Notes on Application

This ORCS amendment is retroactive and applies to all records, regardless of location (onsite and off-site storage) and media, which are in the custody and control of the ministry.

Any 57600-04 Pre-placement examinations (candidates not hired) records and 57600-20 Employee health files (no exposure) records created until the day before June 1, 2013 would fall under the previous 10 year semi-active retention, and any records created on or after June 1, 2013 would fall under the new 16 year retention, as per when the *Limitation Act* (SBC 2012, c. 13) was amended.

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

DRAFT

This is an approved information schedule, as defined by the [Information Management Act \(SBC 2015, c. 27\)](#). For more information consult your [Government Records Officer](#).

57600-03 Influenza vaccination forms (no health file) created until the day before Feb 1, 2008 would fall under the previous 7 year semi-active retention, and any records created by Occupational Health & Rehabilitation staff on or after February 1, 2008 would fall under the new ten year retention under the *Occupational Health & Safety Guidelines*: G6.34-5 from WorkSafeBC.

Standard Appraisal Considerations

The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. The final dispositions have been reviewed to ensure that records having enduring evidential and informational values are preserved.

Specific Appraisal Considerations

No records are scheduled to be transferred to the government archives.

All other records covered under this schedule are destroyed at the end of their retention periods.

SUMMARY LIST OF NEW / AMENDED CLASSIFICATIONS

SECTION 1 – Public Service Personnel Management

Classification	Classification Title	Retention
57600	OCCUPATIONAL HEALTH	
57600-03	Influenza vaccination forms (no health file)	CY 10y DE
57600-04	Pre-placement examinations (candidates not hired)	CY 16y DE
57600-07	Sick leave forms	SO nil DE
57600-20	Employee health files (no exposure)	SO 16y DE

Endorsements

This schedule was developed in consultation with staff and managers who conduct the operational functions in the creating agency. It has also been reviewed by appropriate Government Records Service staff to ensure it meets scheduling and appraisal standards, and reflects sound record keeping practices.

Schedule Number: 181080

Application: 170442

Schedule Developer: Angela Ruscoff, Archivist, 2023-08-16

Endorsed by Government Records Service: Mario Miniaci, Director, Archival Records and Initiatives, 2023-08-09

The government body endorses this schedule and its implementation: Dr. William H. Lakey MD, Medical Director, Workplace Health and Safety Division, 2023-08-01

The Information Management Advisory Committee recommends this schedule for approval: 2023/10/05

Approved by the Chief Records Officer: Charmaine Lowe, 2023-10-24

END OF EXECUTIVE SUMMARY

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

ADMINISTRATIVE AMENDMENT APPROVAL FORM (ARS 636)**DESCRIPTION**

Upon approval of this administrative amendment, the functions covered in the following secondary within the Public Service Personnel Management ORCS will be split in two to reflect new filing practices and facilitate the management of the records in TRIM.

57420-30 LTD case management files SO/20y/DE

The new secondary, described below, retains the same SO and retention information as the original. The *includes* note is unique.

57420-45 Subrogation files SO/20y/DE

Note: This administrative amendment applies to all active records, both physical and electronic.

See attached amended pages from the approved schedule, and memo from the Records Officer authorizing these changes.

REVIEW AND APPROVAL SIGNATURES

Records Management Operations (RMO) approves the schedule change as an administrative amendment.

1. Prepared by:

Gene Weber

2013/02/05

Genevieve Weber, Archivist, RMO
YYYY/MM/DD

3. Approved by:

Glen Isaac

2013/02/05

Glen Isaac, Manager, RMO

YYYY/MM/DD

2. Approved by:

Lynne Tibbitt

2013/02/05

Lynne Tibbitt, Secretary
Public Documents Committee

YYYY/MM/DD

Effective date: See above
(if different than approved date)

YYYY/MM/DD

approver initials



Schedule No. 181080

RECORDS RETENTION AND DISPOSITION AUTHORITY

Amendment No. 195773

This is a recommendation to amend the above-noted records schedule.

Title: Public Service Personnel Management Operational Records Classification System – Amendment 1

British Columbia Public Service Agency

Description and Purpose:

The purpose of this amendment is to update the ORCS to add three new secondaries and revise retention periods for three secondaries in primaries 57420 Employee Benefits - Disability Case Management, and 57480 Employee Benefits - WCB Claim Appeals.

For further descriptive information about these records, please refer to the attached schedule.

Date range: 1900 ongoing

Physical format of records: see attached schedule

Annual accumulation: 12 cubic meters

Recommended retention and disposition: scheduled in accord with attached records schedule.

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:


Records Officer

Aug 4, 2011
Date


Executive Director/ADM

Aug 18, 2011
Date


Deputy Minister/Corporate Executive

22 Aug 2011
Date

THE PUBLIC DOCUMENTS COMMITTEE CONCURS:


Chair, PDC

27 Oct 2011
Date

**THE SELECT STANDING COMMITTEE ON PUBLIC
ACCOUNTS APPROVES THE RECOMMENDATION OF
THE PUBLIC DOCUMENTS COMMITTEE:**

APR 24 2012
Date

**APPROVED BY RESOLUTION OF THE LEGISLATIVE
ASSEMBLY:**

MAY 31 2012
Date

OTHER STATUTORY APPROVALS:

Signature
Title:

Date

Signature
Title:

Date

CONTACT: Bea Nacey, Ministry Records Officer, (250) 3874594

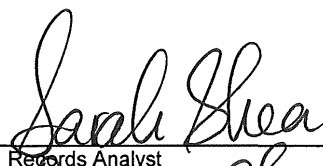
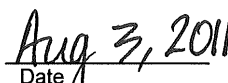
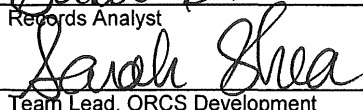
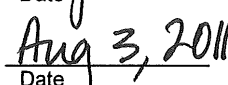
RECORDS MANAGEMENT APPRAISAL:

This appraisal documents the recommendation for active and semi-active retention periods.

These records are created and received under the authority of the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and *Public Service Labour Relations Act* (RSBC 1996, c. 388), and subsequent legislation governing the operational responsibilities and functions of the creating agency.

Functional duplicates and microfilmed records are indicated in the attached schedule.

The retention and final disposition guidelines specified in the attached *Operational Records Classification System* amendment meet the creating agency's information requirements, ensure fiscal and audit control, protect government's legal rights and liabilities, and provide for effective management of the agency's operational functions. Upon expiry of the active and semi-active retention periods, the records covered by this recommendation will no longer be of any primary value to government.


Records Analyst
Date
Team Lead, ORCS Development
Date**ARCHIVAL APPRAISAL:**

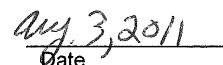
This appraisal documents the recommendation for final disposition.

The final disposition recommendations protect records considered to have significant evidential and historical values. The specific reasons for retaining certain records are stated within the ORCS, as well as in the Executive Summary.

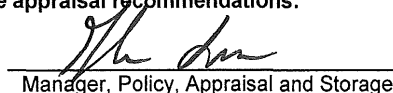
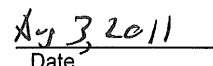
Record series or groups of records which will be retained in their entirety are indicated by "Full Retention."

Record series or groups of records which will be retained in part are indicated by "Selective Retention." Selective retention means that portions of the record series will be retained by means of recognized archival selection criteria. For the meaning of selective retention with respect to a specific record series, see the attached schedule.

The definitions of both selective and full retention provide that records will be preserved in the government archives, and that unnecessary duplicates, transitory materials, and ephemera may be discarded.


Archivist
Date

The undersigned endorses the appraisal recommendations:


Manager, Policy, Appraisal and Storage
Date

OPERATIONAL 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 ORCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A

SA

FD

PUBLIC SERVICE PERSONNEL MANAGEMENT ORCS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

EXECUTIVE SUMMARY FOR AMENDMENT 1

This *Operational Records Classification System (ORCS)* amendment updates the classification system and retention and disposition schedule for the operational records created by the British Columbia Public Service Agency under the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and *Public Service Labour Relations Act* (RSBC 1996, c. 388).

This amendment adds three new secondaries and revises retention periods for three secondaries in primaries 57420 Employee Benefits - Disability Case Management and 57480 Employee Benefits - WCB Claim Appeals.

The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. Records Management Operations has reviewed the final dispositions to ensure that records having enduring evidential and historical values are preserved.

The following summary describes the five secondaries added to or amended within the ORCS with a retention period greater than seven years. In this summary, record types are linked to the ORCS by primary and secondary numbers. For a detailed description of all amendments, please consult Appendix A: Summary of Changes to the *Public Service Personnel Management ORCS* (concordance table).

- 1) Disability case and LTD claim management data
(secondary 57420-20)

SO+20y nil DE

This data covers employees who are ill or injured and may be receiving Short Term Illness and Injury Plan (STIIP) or equivalent (e.g., Weekly Indemnity [WIN]), Long Term Disability (LTD), or workers' compensation benefits and includes the Rehabilitation Committee minutes pertaining to relevant employees.

SO = upon retirement, resignation, or employment termination from the BC public service

(continued on next page)

A = Active
SA = Semi-active
FD = Final Disposition
FOI = Freedom of Information/Privacy
PIB = Personal Information Bank
OPR = Office of Primary Responsibility

CY = Calendar Year
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w = week m = month
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SO = Superseded or Obsolete
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SR = Selective Retention
FR = Full Retention
OD = Other Disposition
VR = Vital Records

OPERATIONAL 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 ORCS has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

A SA FD

20y = The 20-year retention period is consistent with the retention period for employee history data, allows for statistical analysis, and provides a sufficient historical perspective in order to effectively evaluate the performance of disability case management services.

2) Employee disability tombstone data
(secondary 57420-27)

SO+20y nil DE

This data consists of employee disability tombstone information, including name, address, and telephone number used to support the case management of employees who are on STIIP, WIN, LTD or workers' compensation benefits.

SO = upon retirement, resignation or employment termination from the BC public service

20y = The 20-year retention period is consistent with the retention period for employee history data and allows for employment verification relating to historical WorkSafeBC claims.

3) WCB claim cost data
(secondary 57480-30)

SO+20y nil DE

This data, stored on the DDMA/ICM System, is used for claims costs analysis purposes.

SO = after last claim cost received or upon conclusion of all appeals and appeal periods

20y = The 20-year retention period provides a sufficient historical perspective for research and analysis and is consistent with the semi-active retention period for the disability case management data classified under secondary 57420-20.

4) Disability case management files
(secondary 57420-35)

SO 20y DE

These records consist of disability case management files, opened when a Disability Case Manager becomes involved with an employee who is on STIIP, WIN or LTD. If the employee applies for LTD, a LTD case management file (secondary -30) will also be opened.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

SO = when case is closed (i.e., employee requalifies for STIIP or LTD benefits by clearing the successive disabilities timeframe specified in the *Long Term Disability Plan Regulation* [BC Reg. 409/97, s. 2.7]) and outstanding issues [e.g. return to work, grievance, or arbitration] are concluded

20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee is again on STIIP, WIN, LTD or workers' compensation benefits.

5) MSP and group life payment tracking and T4 data
(secondary 57420-40)

FY+7y nil DE

This data is used for the reconciliation and bill payment of applicable MSP and group life premiums for employees on LTD. Amounts paid are then used to produce T4s for taxable benefits.

8y = The eight-year retention period is based on the six-year assessment period under the *Income Tax Act* (RSC 1985, c. 1 (5th Supp.), s. 230(4)) and is consistent with the retention period for accounts payable and reconciliation records in ARCS.

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RECORDS RETENTION AND DISPOSITION AUTHORITY

This is a recommendation to authorize an operational records classification and scheduling system.

Title: *Public Service Personnel Management Services Operational Records Classification System*

British Columbia Public Service Agency

Description and Purpose:

The *Public Service Personnel Management Services Operational Records Classification System (ORCS)* covers all operational records created, received, and maintained by all offices of the British Columbia Public Service Agency. These records document the provision of personnel services to the BC government including policy development, workforce restructuring, hiring, leadership development, job evaluation and classification, benefits, labour relations, collective bargaining, dispute resolution, occupational safety and health, disability case management, workers' compensation claim appeals, and employee work history, training and recognition.

For further descriptive information about these records, please refer to the attached executive summary.

Date range: 1900 ongoing

Physical format of records: see attached schedule

Annual accumulation: 12 cubic meters

Recommended retention and disposition: scheduled in accord with attached ORCS.

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:

Blair Turner June 2, 2006
Records Officer Date

[Signature] _____ Date
Executive Director/ADM

[Signature] _____ Date
Deputy Minister/Corporate Executive

THE PUBLIC DOCUMENTS COMMITTEE CONCURS:

[Signature] 19 JAN 2007
Chair, PDC Date

THE SELECT STANDING COMMITTEE ON PUBLIC ACCOUNTS APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE:

[Signature] April 4 2007
Date

APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY:

[Signature] NW 22 2007
Date

OTHER STATUTORY APPROVALS:

Signature
Title:

Date

Signature
Title:

Date

CONTACT: Trevor Youdale, Records Systems Analyst, (250) 387-1907

RECORDS MANAGEMENT APPRAISAL:


This appraisal documents the recommendation for active and semi-active retention periods.

These records are created and received under the authority of the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and *Public Service Labour Relations Act* (RSBC 1996, c. 388), and subsequent legislation governing the operational responsibilities and functions of the creating agency.

Functional duplicates and microfilmed records are indicated under appropriate classification headings.

The retention and final disposition guidelines specified in the attached *Operational Records Classification System* meet the creating agency's information requirements, ensure fiscal and audit control, protect government's legal rights and liabilities, and provide for effective management of the agency's operational functions. Upon expiry of the active and semi-active retention periods, the records covered by this recommendation will no longer be of any primary value to government.

The retention and final disposition guidelines have been established in consultation with the Records Officer and staff and managers of all branches conducting operational functions in the creating agency.


Records Analyst

2006/05/02
Date

ARCHIVAL APPRAISAL:

This appraisal documents the recommendation for final disposition.

The final disposition recommendations protect records considered to have significant evidential and historical values. The specific reasons for retaining certain records are stated within the *ORCS*, as well as in the Executive Summary.

Record series or groups of records which will be retained in their entirety are indicated by "Full Retention."


Record series or groups of records which will be retained in part are indicated by "Selective Retention." Selective retention means that portions of the record series will be retained by means of recognized archival selection criteria. For the meaning of selective retention with respect to a specific record series, see the attached schedule.

The definitions of both selective and full retention provide that records will be preserved in the government archives, and that unnecessary duplicates, transitory materials, and ephemera may be discarded.


Archivist

2006/05/02
Date

The undersigned endorses the appraisal recommendations:


Director, Corporate Information Management Branch

2006-05-02
Date

OPERATIONAL 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 *ORCS* has been implemented according to standards approved by Corporate Information Management Branch. For assistance in implementing *ORCS*, contact your Records Officer.

A SA FD

PUBLIC SERVICE PERSONNEL MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

EXECUTIVE SUMMARY

This *Operational Records Classification System (ORCS)* establishes a classification system and retention and disposition schedule for the operational records created by the British Columbia Public Service Agency under the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and *Public Service Labour Relations Act* (RSBC 1996, c. 388).

These records document the provision of personnel management services to the BC Government as a whole, including line managers, human resource practitioners, and employees. This includes records relating to: personnel policy development, workforce restructuring, hiring, leadership development and recruitment, job evaluation, position classification, benefits and compensation, labour relations, collective bargaining, dispute resolution, occupational safety and health, disability case management, workers' compensation claim appeals, and employee work history, training, and recognition.

The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. Corporate Information Management Branch (CIMB) has reviewed the final dispositions to ensure that records having enduring evidential and historical values are preserved.

This *ORCS* covers records created and received since 1900, which corresponds to the earliest terminated employee files covered by this *ORCS*. Other records relating to the functions documented in this *ORCS* have been disposed of under the *Administrative Records Classification System (ARCS)* and appraised and scheduled under one-time records schedule(s) and/or under ongoing records schedule(s), and transferred to the government archives or destroyed as appropriate.

The following summary describes the types of records covered by this *ORCS* and identifies their retention periods and final dispositions. In this summary, record types are linked to the *ORCS* by primary and secondary numbers. Please consult the *ORCS* manual for further information.

(continued on next page)

A = Active
SA = Semi-active
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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	<u>A</u>	<u>SA</u>	<u>FD</u>
1) <u>Policy and Procedures</u> (secondary -00 throughout ORCS)	SO	5y	FR
FR = Throughout this ORCS, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedures development and approval. These records have evidential value.			
2) <u>Personnel Policy Manuals and Policy Development Files</u> (secondaries 57050-03 and -20) (secondary 57050-04) (paper and electronic records)	SO SO	10y nil	FR FR
These records document policies developed for the management of BC Government employees.			
SO = when policy is reviewed, developed, abandoned, or cancelled			
10y = The 10-year retention period provides sufficient time for research and consultation.			
FR = The government archives will fully retain Personnel Policy Manuals and policy development files because they document and provide legal evidence of the personnel policies of the BC Government over time.			
3) <u>Personnel Management Practice Guidelines</u> (secondary 57000-02) (electronic records)	SO	nil	SR
These records document personnel procedures, guidelines, and best practices to assist client ministries and agencies in the implementation of the BC Government's personnel policies.			
SR = The government archives will selectively retain personnel management practice guidelines by retaining all information bulletins, generic policy statements and best practices guidelines. These records document guidelines and policy advice provided to clients on personnel management practices and issues by the BCPSA.			

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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	<u>A</u>	<u>SA</u>	<u>FD</u>
4) <u>Talent Management Projects and Strategies</u>			
(secondary 57800-02)	SO	nil	FR
(secondaries 57800-20, -30, -40, and -50)	SO	10y	DE

These records document projects and strategies designed to secure, develop, advance, and motivate talented employees in the BC public service.

SO = when project or strategy is completed, closed, or cancelled, and when no longer required for reference purposes

10y = The 10-year retention period provides sufficient time for research and consultation, and ensures that the information will be dated and have little reference value.

FR = The government archives will fully retain talent management project/strategy final documents because they describe the BC public service's plans and strategies for securing, developing, advancing, and motivating its employees.

5) <u>Leadership Development Participants and Projects</u>			
(secondary 57880-02)	SO	nil	FR
(secondary 57880-30)	SO	10y	DE

These records document the development and advancement of senior leaders from within the BC public service, as well as related projects.

SO = upon employment termination, or when reclassified under secondary -35 because participant chose to opt out of the program

10y = The 10-year retention period is consistent with the retention period for executive appointment files.

FR = The government archives will fully retain leadership development final products because they document tools and programs for defining and developing senior leaders within the BC public service.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
6) <u>Appointment Files</u>			
(secondary 57850-20)	SO	10	FR
(secondary 57870-02)	CY+4y	5y	DE

These records document the appointment of executives and the direct appointment of other employees to the BC public service.

SO = upon retirement, resignation, or employment termination from the BC public service

10y = The 10-year retention period provides sufficient time for review and consultation.

FR = The government archives will fully retain executive appointment files because they document the appointment, terms and conditions of employment, and the biographies and professional careers of senior leaders within the BC public service (associate deputy ministers, deputy ministers and equivalent positions).

7) <u>Position Classification and Appeals</u>			
(secondary 57360-40)	SO	10y	FR
(secondaries 57360-02 and -20)	SO+10y	nil	DE
(secondaries 57360-50 and -70)	SO	10y	DE
(paper and electronic records)			

These records document the classification of positions and the resolution of classification appeals.

SO = when position is redundant, and in the case of appeals, upon conclusion of appeals and appeal periods

10y = The 10-year retention period provides sufficient time for research, consultation and potential reactivation of closed files. However, after a lapse of 10 years, it is unlikely that the job will be recreated or the files will have any reference value.

FR = The government archives will fully retain generic job files because they provide a history of BC Government jobs over time. These records include generic job descriptions, generic organization charts, and lists of positions matched to the relevant generic job description and organization chart.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
8) <u>PECSF Charitable Donation Program</u> (secondary 57100-07) (secondaries 57100-04 and -08)	SO FY+1y	nil 6y	FR DE

These records document the organization, structure, and activities of the Provincial Employee Community Services Fund (PECSF), including the approval of related gaming events and the reconciliation and disbursement of employees' donations to their selected charities.

8y = The eight-year retention period is based on the six-year assessment period under the *Income Tax Act* (RSC 1985, c. I-5, s. 230[4]) and is consistent with the retention period for related financial records classified in ARCS.

FR = The government archives will fully retain Provincial Employee Community Services Fund annual reports because the reports summarize the organization and structure of the PECSF, its annual fundraising campaigns, and itemize contributions dispersed each year to charities supported by provincial government employees.

9) <u>Job Evaluation Plans</u> (secondary 57320-02) (secondary 57320-20)	SO SO+2y	nil 5y	FR DE
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These records document the system for comparing, evaluating, and classifying jobs within the BC Government.

SO = when replaced by new job evaluation plan

7y = The seven-year retention period provides sufficient time for research and consultation.

FR = The government archives will fully retain job evaluation plan manuals because they are the standard measuring tool for evaluating and rating BC public service positions.

(continued on next page)

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	<u>A</u>	<u>SA</u>	<u>FD</u>
10) <u>Human Resource Service Agreements</u> (secondaries 57220-02 and -03) (secondary 57220-30)	SO SO+3y	nil 4y	FR DE

These records document the human resource services agreed to by client ministries and agencies.

SO = upon termination of agreement

7y = The seven-year 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).

FR = The government archives will fully retain human resource account management reports because they provide a succinct summary of human resource services received by ministries and agencies. The government archives will also fully retain human resource service level agreement packages because they include a copy of the service level agreement negotiated annually with ministries, as well as appended documents that outline the service delivery framework, governance, and roles and responsibilities.

11) <u>Employee Recognition Programs</u> (secondary 57830-02) (secondary 57830-05)	SO CY+2y	nil nil	FR SR
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These records document the development and administration of cross-government employee recognition programs (e.g., Premier's Innovation and Excellence Awards, Improvement Awards, Staff Appreciation Awards, Long Service Awards, Public Service Week, and informal recognition programs).

FR = The government archives will fully retain employee recognition activity reports because they provide a concise summary of the BC Government's recognition of its employees, including the number of employees recognized and the types of recognition received.

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A SA FD

SR = The government archives will selectively retain Premier's Innovation and Excellence Award ceremony materials by retaining the ceremony program guides because they summarize nominated ideas and initiatives.

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|-----|---|----|-----|----|
| 12) | <u>Collective Bargaining and Agreements</u>
(secondaries 57520-02 and -30) | SO | nil | FR |
|-----|---|----|-----|----|

These records document collective bargaining negotiations and the agreed upon terms and conditions of employment for bargaining unit employees.

SO = upon termination of agreement and expiry of the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s.3), and when no longer required for reference purposes

FR = The government archives will fully retain collective agreements, memoranda of agreement, and collective bargaining binders because they provide a history of the terms and conditions of employment for bargaining unit employees and document the positions of the BC Government and its unions during the collective bargaining process.

- | | | | | |
|-----|--|----|-----|----|
| 13) | <u>Transfer Agreements for Bargaining Unit Employees</u>
(secondary 57520-50) | SO | nil | FR |
|-----|--|----|-----|----|

These records document negotiated transfers of collective agreement rights for employees transferred from or to the BC Government.

SO = upon termination of agreement and expiry of the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s.3), and when no longer required for reference purposes

FR = The government archives will fully retain transfer agreements because they document the transfer of bargaining unit employee rights from and to the BC Government.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
14) <u>Grievance Arbitration Files, Awards, and Appeals</u>			
(secondaries 57540-02 and -03)	SO	nil	FR
(secondary 57540-40)	SO	nil	DE

These records document grievances filed for arbitration and arbitration awards and appeals.

SO = when grievance is withdrawn or settled, or upon conclusion of arbitration and expiry of appeal periods and appeals, and when no longer required for reference purposes

FR = The government archives will fully retain grievance arbitration awards and appeal decisions because they document significant grievances, and in the case of formal arbitrations, establish legal precedent. These records have significant evidential and informational value in documenting employer and employee relations.

15) <u>Human Rights Complaints</u>	SO	nil	FR
(secondary 57540-60)			

These records document discrimination and personal and sexual harassment complaints.

SO = when complaint is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

FR = The government archives will fully retain human rights complaint files because they document significant human rights cases involving government employees. These records have significant evidential and informational value in documenting employer and employee relations.

16) <u>Labour Relations Complaints</u>	SO	nil	FR
(secondary 57540-70)			

These records document complaints filed under the *Labour Relations Code* (RSBC 1996, c. 244), *Public Service Labour Relations Act (PSLRA)* (RSBC 1996, c. 388), and *Employment Standards Act* (RSBC 1996, c. 113).

(continued on next page)

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A SA FD

SO = when complaint is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

FR = The government archives will fully retain labour relations complaint files because they document significant disputes between the union and the employer and the employer and its employees. These files also include union and employee disputes that serve to interpret the collective agreement.

- | | | | | |
|-----|--|----|-----|----|
| 17) | <u>Strike and Essential Service Planning</u>
(secondary 57500-40) | SO | nil | FR |
|-----|--|----|-----|----|

These records document the BC Government's plans and strategies for responding to strikes by its unions.

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

FR = The government archives will fully retain strike and essential service planning files because they significantly document the Government of BC's plans and strategies for responding to strikes by its unions.

- | | | | | |
|-----|---|----|-----|----|
| 18) | <u>Salary Schedules</u>
(secondary 57300-04) | SO | nil | FR |
|-----|---|----|-----|----|

These records document salary ranges, rates and increases for bargaining unit and excluded positions.

SO = when no longer required for reference purposes

FR = The government archives will fully retain salary schedules because they provide a concise history of BC public service salary rates and rate increases over time.

(continued on next page)

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	<u>A</u>	<u>SA</u>	<u>FD</u>
19) <u>Benefit Program Management</u>			
(secondary 57400-02)	SO+2y	nil	SR
(secondaries 57400-20 and -30, 57440-20 and -30, 57460-20 and -30, and 57480-40)	SO	7y	DE
(secondaries 57440-02 and 57440-03)	CY+2y	7y	DE

These records document the development and administration of the BC Government's benefit plans.

SO = upon resolution of inquiry, problem, or issue or upon completion of research and analysis, and when no longer required for review and analysis

7y = The seven-year semi-active retention period provides sufficient time for consultation and ensures that agreements are retained for the six-year limitation period under the Limitation Act (RSBC 1996, c. 266, s.3).

SR = The government archives will selectively retain these files by retaining the final annual reports. These reports provide a concise summary of the government's benefit plans, their costs, utilization, and participating employers.

20) <u>Occupational Health Files</u>			
(secondary 57600-25)	SO	30y	DE
(secondaries 57600-02, -06, and -20)	SO	10y	DE
(secondary 57600-04)	CY	10y	DE
(secondary 57600-03)	CY	7y	DE
(paper and electronic records)			

These records document the health of employees on sick leave and long term disability and their fitness to return to work; exposure of employees to latent biological hazards (e.g., asbestos, blood borne pathogens, and radiation); medical examinations of prospective employees for positions that require physical competency screening; and vaccinations against influenza and the hepatitis B virus for employees at risk of occupational exposure.

(continued on next page)

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A SA FD

SO = upon resignation, employment termination, or retirement from the BC pubic service, or death while in service; and in the case of influenza vaccinations, when vaccinated, and pre-employment examinations for job candidates who are not hired, when candidate is certified as unfit for the job

30y = The 30-year semi-active retention period for latent biological exposure files provides a reasonable length of time for the effects of the exposure to occur.

10y = The 10-year semi-active retention period satisfies the minimum six-year retention period for patient records specified by the College of Physicians and Surgeons of BC in *Rules Made Under the Medical Practitioners Act* (RSBC 1996, c. 285) and provides a reasonable length of time for consultation.

7y = The seven-year semi-active retention period for influenza vaccinations satisfies the minimum six-year retention period for patient records.

21) Disability Case Management

(secondary 57420-20)

(secondary 57420-30)

(paper and electronic records)

SO+20y nil DE
SO 20y DE

These records document the case management of employees who are on Short Term Illness and Injury Plan (STIIP) or equivalent (e.g., Weekly Indemnity [WIN]), Long Term Disability (LTD), or workers' compensation benefits.

SO = when case is closed (i.e., employee requalifies for STIIP or LTD benefits by clearing the successive disabilities timeframe specified in the *Long Term Disability Plan Regulation* [BC Reg. 409/97, s.2.7]) and outstanding issues [e.g., return to work, grievance, or arbitration] are concluded)

20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee is again on STIIP, WIN, LTD or workers' compensation benefits.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
22) <u>Workers' Compensation Appeals and Claim Cost Data</u>			
(secondary 57480-30)	SO+20y	nil	DE
(secondary 57480-20)	SO	7y	DE
(paper and electronic records)			

These records document the employer's representation on workers' compensation appeals, as well as the costs of workers' compensation claims.

SO = upon conclusion of all appeals and appeal periods

20y = The 20-year retention period for the workers' compensation claim cost data provides a sufficient historical perspective for research and analysis and is consistent with the retention period for the disability case management data.

7y = The seven-year retention period for the workers' compensation appeal files provides sufficient time for consultation.

23) <u>Severance Files</u>	SO	20y	DE
(secondary 57900-60)			

These records document severance amounts paid on employment termination in recognition of loss of employment.

SO = upon issue of last T4A or expiry of "mitigation" date, whichever is later

20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee returns to the BC public service and negotiates another severance payment. It also satisfies the six-year limitation period for commencing an action with respect to a contract under the *Limitation Act* (RSBC 1996, c. 266, s.3) and the six-year retention period under the *Income Tax Act* (RSC 1985, c. I-5, s. 230[4]) for the T4As that are issued.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
24) <u>Employment and Training Data</u> (secondaries 57240-30 and 57820-50) (electronic records)	SO+20y nil		DE

These records document employment and training information about BC Government employees that is recorded on the Corporate Human Resource Information and Payroll System (CHIPS).

SO = upon retirement, resignation, or employment termination from the BC public service

20y = The 20-year retention period provides a sufficient historical perspective for trend analysis.

25) <u>Employee Personnel Files</u> (secondaries 57240-20 and -40)	SO	10y	DE
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These records document the employment history of BC Government employees.

SO = upon retirement, resignation, or employment termination from the BC public service

10y = The 10-year semi-active retention period provides a reasonable length of time for consultation and reactivation of the files if the employee is again employed by the BC Government. It also allows for the bridging of service (which is six years under the collective agreement but may be extended in special circumstances) and provides for the five years allowed for purchasing pensionable service.

26) <u>Grievances and Excluded Employee Disputes</u> (secondaries 57540-20 and -30)	SO	10y	DE
--	----	-----	----

These records document grievances resolved under step 2 of the collective agreement process and disputes resolved under the dispute resolution process for excluded employees.

SO = when dispute is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

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A SA FD

10y = The 10-year semi-active retention period provides a reasonable length of time for consultation.

- | | | | | |
|-----|---|-------|----|----|
| 27) | <u>Terms and Conditions of Employment Files</u>
(secondary 57300-40) | SO+2y | 5y | DE |
|-----|---|-------|----|----|

These records document proposed changes and updates to the terms and conditions of employment for employees not covered by the collective agreement (i.e., excluded employees).

SO = upon completion or cancellation of proposed change and when no longer required for reference purposes

7y = The seven-year retention period provides sufficient time for research and consultation.

DE = These records may be destroyed upon the approval of the Records Officer because the proposed changes to the terms and conditions are summarized in Treasury Board submissions and if approved, are published in the *Personnel Policy Manual*, which is fully retained by the government archives.

- | | | | | |
|-----|---|-------|----|----|
| 28) | <u>Compensation Issue and Project Files</u>
(secondaries 57300-03, -20, and -30) | SO+2y | 5y | DE |
|-----|---|-------|----|----|

These records document over-job-rate requests, temporary market salary adjustment research, compensation frameworks, and senior management compensation and classification issues.

SO = upon resolution of issue or completion or cancellation of project

7y = The seven-year retention period provides sufficient time for research and consultation.

- | | | | | |
|-----|--|-------|----|----|
| 29) | <u>Placement Files</u>
(secondaries 57900-20, -25, and -30) | SO+1y | 6y | DE |
|-----|--|-------|----|----|

These records document job placements for employees affected by workforce restructuring or by an illness or injury.

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A SA FD

SO = when employee is placed in a vacant position and upon conclusion of probation period and when no further action is anticipated

7y = The seven-year retention period provides sufficient time to ensure that the employee is properly and permanently placed.

- | | | | | |
|-----|---|-------|----|----|
| 30) | <u>Retirement Allowance Files</u>
(secondary 57900-50) | CY+1y | 8y | DE |
|-----|---|-------|----|----|

These records document retirement allowances paid on an employee's retirement (from age 55 to 65) in recognition of long service.

10y = The 10-year retention period provides sufficient time to ensure that all participating employees will have reached the age of 65 and that their inquiries concerning their retirement allowances will have ended. It also satisfies the six-year retention period under the *Income Tax Act* (RSC 1985, c. I-5, s. 230[4]) for the T4As that are issued.

- 31) Electronic Records DE

The following electronic databases are covered by this *ORCS*: Corporate Human Resource Information and Payroll System (CHIPS), Disability Data Management Application (DDMA), Electronic Classification system (E-CLASS), Employee Recognition System (ERS), First Aid Assessment Tool (FAAT), Foxpro Claim Cost System (Foxpro), Grievance Tracking System (GTS), Long Service Award Registration System (LSARS), Occupational Health Manager (OHM), and Workforce Adjustment Tracking System (WFAS). The Information System Overview section provides information about the electronic systems, inputs and outputs and routine back-ups. Notes under the relevant *ORCS* secondaries provide information about the classification and scheduling of the records. These records have no enduring value to government at the end of their scheduled retention period.

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A SA FD

32) All Other Records

DE

All other records are destroyed at the end of their semi-active retention periods. The retention of these records varies depending on the nature of the records and the function performed, but does not exceed five years after they are superseded or obsolete. The information these records contain is summarized elsewhere, or reflects policies and procedures adequately documented in records covered by the -00 Policy and procedures secondaries. Significant issues are documented in records which will be retained under the provisions of this ORCS, as well as in briefing notes to the ministry executive (ARCS secondary 280-20) and annual reports (ARCS secondary 442-20). These records have no enduring value to government at the end of their scheduled retention periods.

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INTRODUCTION TO THE *PUBLIC SERVICE AND PERSONNEL MANAGEMENT* ORCS

For further information, contact your [Records Officer](#).

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1. **General**

This introduction provides an overview of the functions and activities documented in records classified and scheduled under the *Public Service and Personnel Management Operational Records Classification System* (PSPM ORCS).

For general information about the purpose, organization, and elements of ORCS in general, and of the *Administrative Records Classification System* (ARCS), see the *ARCS and ORCS User Guide* available on BC Government's Records Management web site at http://www.gov.bc.ca/citz/iao/records_mgmt/arcs_orcs/. It is designed to help you understand, interpret and use ARCS and ORCS.

For special schedules that cover records that are not covered by ARCS and ORCS, see <http://www.lcs.gov.bc.ca/cimb/special/default.asp>.

For legislation, policies, and standards for managing records in the BC Government, see http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/.

For tips, guides, and FAQs on related topics, see http://www.gov.bc.ca/citz/iao/records_mgmt/guides/.

2. **Overview of this ORCS**

The operational records in this ORCS relate to the operations and services provided by your ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or policy.

This ORCS has the following parts:

- Executive Summary:
 - a copy of the signed records retention and disposal authority (ARS 008) form
 - a high-level overview of the ORCS
 - a register of approved formal or administrative amendments
- Table of Contents
- Introduction (this section)
- Section 1 and any other numbered sections with classifications and schedules for the records covered by this ORCS; see part 3 below for further information
- Information System Overview Section:
 - descriptions of complex electronic systems and web sites
 - may also include a list of simple systems
- Index
- Appendices: may be added to provide file codes, ongoing accession numbers, filing procedures, and/or other classification or records management guidelines

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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3. The Functions and Activities Covered by this ORCS

Section Number	Primary Numbers	Section Title
Section 1	57000-57999	Public Service Personnel Management

Covers records relating to the provision of personnel management services to the BC government as a whole, including line managers, human resource practitioners, and employees under the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and *Public Service Labour Relations Act* (RSBC 1996, c. 388). This includes records relating to: personnel policy development, workforce restructuring, hiring, leadership development and recruitment, job evaluation, position classification, benefits and compensation, labour relations, collective bargaining, dispute resolution, occupational safety and health, disability case management, workers' compensation claim appeals, and employee work history, training, and recognition.

4. Legal Authority of this ORCS

Under provisions of the *Document Disposal Act* (RSBC 1996, c. 99), this ORCS has been reviewed and endorsed by the following authorities:

- government archivists
- your executive
- the Public Documents Committee
- the Select Standing Committee on Public Accounts

Upon approval by the Legislative Assembly, this ORCS becomes a legally binding document, i.e., it has statutory authority governing the retention and disposition of the records that it covers.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SECTION 1

PUBLIC SERVICE PERSONNEL MANAGEMENT

PRIMARY NUMBERS

57000 - 57999

Section 1 covers records relating to the provision of personnel management services to the BC Government as a whole, including line managers, human resource practitioners, and employees under the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and *Public Service Labour Relations Act* (RSBC 1996, c. 388). This includes records relating to: personnel policy development, workforce restructuring, hiring, leadership development and recruitment, job evaluation, position classification, benefits and compensation, labour relations, collective bargaining, dispute resolution, occupational safety and health, disability case management, workers' compensation claim appeals, and employee work history, training, and recognition.

A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete
SA =	Semi-active	FY =	Fiscal Year	DE =	Destruction
FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
OPR =	Office of Primary Responsibility			VR =	Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SECTION 1

57000 - PUBLIC SERVICE PERSONNEL MANAGEMENT - 57999

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57000 PUBLIC SERVICE PERSONNEL MANAGEMENT - GENERAL
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57300 COMPENSATION - GENERAL
57320 - JOB EVALUATION
57360 - POSITION CLASSIFICATION AND APPEALS

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57420 - DISABILITY CASE MANAGEMENT
57440 - DISABILITY PROGRAM MANAGEMENT
57460 - EMPLOYEE AND FAMILY ASSISTANCE
57480 - WCB CLAIM APPEALS

57500 LABOUR RELATIONS - GENERAL
57520 - BARGAINING AND NEGOTIATIONS
57540 - DISPUTE RESOLUTION

57600 OCCUPATIONAL HEALTH

57650 OCCUPATIONAL SAFETY SUPPORT

57800 TALENT MANAGEMENT - GENERAL
57820 - EMPLOYEE LEARNING
57830 - EMPLOYEE RECOGNITION
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57000 PUBLIC SERVICE PERSONNEL MANAGEMENT - GENERAL

Records not shown elsewhere in the public service personnel management section which relate generally to the provision of personnel management services to the BC Government as a whole, including line managers, human resource practitioners, and employees.

On April 1, 2003 personnel management service functions were transferred from provincial government ministries and agencies and consolidated under one central government agency. The new agency (British Columbia Public Service Agency) operates under the authority of the *Public Service Act* (RSBC 1996, c. 385), *Public Service Benefit Plan Act* (RSBC 1996, c. 386), and the *Public Service Labour Relations Act* (RSBC 1996, c. 388). It works in partnership with ministry/agency strategic human resource branches and is accountable to the Deputy Ministers' Council through a memorandum of understanding (MOU) and to individual ministries/agencies through service level agreements. The web site classified under secondary -03 provides additional information on personnel management programs and services available to the BC public service.

Record types include correspondence, guidelines, and web site.

For the MOU and service level agreements, see primary 57220.
For strategic human resource branch services, see ARCS primary 1705.

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 OPR (BC Public Service Agency) 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>	5y	FR
- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

(continued on next page)

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A SA FD

57000 PUBLIC SERVICE PERSONNEL MANAGEMENT - GENERAL
 (continued)

FR = The government archives will retain all policy and procedure files created by offices having primary responsibility for policy and procedure development and approval. These records have evidential value.

-01	General			
-02	Personnel management practice guidelines (electronic records) (includes information bulletins, generic policy statements, best practices guidelines, checklists, and template letters)	SO	nil	SR

SR = The government archives will selectively retain personnel management practice guidelines by retaining all information bulletins, generic policy statements and best practices guidelines. These records document guidelines and policy advice provided to clients on personnel management practices and issues by the BCPSA. The retained records will be printed from the BCPSA website upon approval of the *ORCS* and every five years after that. The printed documents will be boxed for transfer to offsite storage along with other operational records with a final disposition of full retention.

NOTE: These guidelines are currently available to client ministries and agencies on the *HR Toolkit*, which is accessed through the web site classified under secondary -03.

-03	Public service personnel management web site	SO	nil	DE
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SO = when the web site is altered, updated, redesigned or closed

DE = As the web site is updated, superseded/obsolete versions of documents on it may be destroyed in

(continued on next page)

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57000 PUBLIC SERVICE PERSONNEL MANAGEMENT - GENERAL
(continued)

accordance with approved retention schedules.
When the web site is closed, it can be destroyed
after relevant schedules have elapsed and/or the
documents have been classified elsewhere.

NOTE: The public service personnel management web site (<http://www.bcpublicservice.ca/index.htm>) provides general information about the services provided by the BC Public Service Agency, including human resource (HR) information pertinent to line managers, employees, and HR practitioners. It contains the *HR Toolkit*, reports and publications, HR policy directives, collective agreements, forms and templates, and access to the First Aid Assessment Tool. Because this is a simple web site, an information system overview for a web site has not been developed.

NOTE: All documents presented on this web site are classified under appropriate secondaries within this *ORCS* or in *ARCS*.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
57050	<u>PUBLIC SERVICE PERSONNEL MANAGEMENT - POLICY</u>				
	Records relating to the establishment of policies for the management of personnel within the BC public service.				
	Record types include correspondence, reports, discussion and issue papers, briefing notes, manuals, and other types of records as indicated under relevant secondaries.				
	Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Policy and Research) will retain these records for:	CY+1y	nil	DE	
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>	
-00	Policy and procedures	- OPR - <u>non-OPR</u>	<u>SO</u> <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-02	Cross-jurisdictional policy research and analysis		SO	5y	DE
	SO = upon completion of research and analysis, and when no longer required for reference purposes				
	5y = The five-year retention period provides sufficient time to ensure these files are no longer required.				
-03	<i>Personnel Policy Manual</i> - original paper versions (includes policies, circulars, memos, and bulletins)		SO	10y	FR
	SO = when replaced by new manual				
	10y = The 10-year retention period provides sufficient time for research and consultation.				
	FR = The government archives will fully retain the original paper versions of the <i>Personnel Policy Manual</i> because they document and provide legal evidence of the personnel policies of the BC Government over time.				

(continued on next page)

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A SA FD

57050 PUBLIC SERVICE PERSONNEL MANAGEMENT - POLICY
(continued)

NOTE: This secondary covers the early paper versions of the *Personnel Policy Manual*, which date from the mid-1980s to June 1998, at which time the manual was published only as a web document.

-04	<i>Personnel Policy Manual</i> - web versions (electronic records)	SO	nil	FR
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FR = The government archives will fully retain web versions of the *Personnel Policy Manual* because they document and provide legal evidence of the personnel policies of the BC Government over time. Upon approval of the *ORCS* the manual will be printed off and every five years after that. The printed documents will be boxed for transfer to offsite storage along with other operational records with a final disposition of full retention.

-20	Personnel policy development files (arrange by policy)	SO	10y	FR
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SO = when the policy is reviewed, developed, abandoned, or cancelled

10y = The 10-year retention period provides sufficient time for research and consultation.

FR = The government archives will fully retain personnel policy development files because they document the rationale and decisions behind the personnel policies classified under secondaries -03 and -04.

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A SA FD

57100 CHARITABLE DONATION PROGRAM

Records relating to facilitating BC Government employee charitable donations through payroll deductions.

This involves planning and organizing annual fundraising campaigns, ensuring gaming fundraising events comply with the gaming licence received from the provincial gaming branch, disbursing contributions to charities, and liaising with volunteer committees.

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

For audits, see ARCS primary 975.

For cheques and bank deposits, see ARCS primary 1050.

For committees, see ARCS secondary 200-20.

For training, see ARCS primary 1735.

Unless otherwise specified below, the ministry OPR (Provincial Employee Community Services Fund) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Campaign planning		CY+2y	nil	DE

NOTE: This secondary includes annual kick-off, thank you, and recognition event planning.

-03	Campaign promotional materials		SO	nil	DE
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SO = when no longer required for reference purposes

NOTE: This secondary includes annual marketing strategies, campaign themes, and related communication material.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57100	<u>CHARITABLE DONATION PROGRAM</u> (continued)			
-04	Donation reconciliation and disbursement records (paper and electronic records)	FY+1y	6y	DE
	8y = The eight-year retention period is based on the six-year assessment period under the <i>Income Tax Act</i> (RSC 1985, c. I-5, s. 230[4]), and is consistent with the retention period for related financial records classified in <i>ARCS</i> .			
	NOTE: This secondary covers the reconciliation and disbursement of employees' charitable donations to various selected charities. The electronic information is currently on Accpac, a PC-based financial management software package. Because this is a simple database, an information system overview has not been created.			
-05	Donor participation (paper and electronic records) (includes forms and spreadsheets)	SO	nil	DE
	SO = when no longer required for review and analysis			
	NOTE: This secondary includes a table of donations dating from 1995 to 2004 (currently on an MS Access database), as well as donor forms completed by canvassers which are summarized on electronic spreadsheets.			
-06	Donor pledge forms	CY+2y	2y	DE
	5y = The five-year retention period provides sufficient time to respond to inquiries and verify contribution amounts.			
-07	PECSF annual report (PECSF = Provincial Employee Community Services Fund)	SO	nil	FR

(continued on next page)

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A SA FD

57100 CHARITABLE DONATION PROGRAM (continued)

FR = The government archives will fully retain Provincial Employee Community Services Fund annual reports because the reports summarize the organization and structure of the PECSF, its annual fundraising campaigns, and itemize contributions dispersed each year to charities supported by provincial government employees.

One copy of each final annual report will be printed upon completion, and then boxed with other records designated for full retention.

-08	PECSF gaming licence and reporting files (includes correspondence, applications, forms, lists of acceptable gaming events, and reports)	FY+1y	6y	DE
-----	--	-------	----	----

8y = The eight-year retention period is consistent with the retention period for related financial records classified in *ARCS*.

NOTE: This secondary covers the annual single gaming event licence issued to PECSF by the provincial gaming branch, gaming forms received from ministries and agencies requesting the licence number and the approval of their gaming events, and gaming revenue reports.

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A SA FD

57200 CLIENT SERVICES - GENERAL

Records relating to the primary point of contact for human resource (HR) clients and the general public not shown elsewhere in this primary block.

This primary covers the provision of HR services to government and external clients, as well as the provision of information to the public on employment opportunities in the BC public service.

Record types include correspondence, rough notes, brochures, contact lists, organization charts, and job postings.

For employee personnel files, see secondary 57240-20.

For occupational safety client files, see secondary 57650-20.

For offers of service, see *ARCS* primary 1665.

For placements, see secondary 57900-20.

For service level agreements, see secondary 57220-30.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Client Services) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Eligibility pool of temporary/auxiliary employees (includes résumés and skill test results)		12m	nil	DE
-03	Job postings				
-20	HR client files (arrange by client)		SO	nil	DE

NOTE: These records document the day-to-day relationship with clients, including the expansion and delivery of HR services to new clients.

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A SA FD

57220 CLIENT SERVICES - ACCOUNT MANAGEMENT

Records relating to managing human resource (HR) services accounts. This involves negotiating annual service agreements, resolving problems, and cultivating effective working relationships with clients, as well as identifying additional service opportunities.

Record types include correspondence, agreements, reports, and matrices.

For client billing records, see *ARCS* secondary 935-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Account 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Human resource account management reports (includes spreadsheets)		SO	nil	FR

FR = The government archives will fully retain human resource account management reports because they provide a succinct summary of human resource services received by ministries and agencies.

One copy of each final human resource account management report will be printed when it is completed and boxed with other records designated for full retention.

NOTE: These reports list the ministries and agencies that are receiving HR services and the level of service provided.

-03	Human resource service level agreement packages		SO	nil	FR
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(continued on next page)

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A SA FD

57220 CLIENT SERVICES - ACCOUNT MANAGEMENT (continued)

FR = The government archives will fully retain human resource service level agreement packages because they include a copy of the service level agreement negotiated annually with ministries, as well as appended documents that outline the service delivery framework, governance, and roles and responsibilities.

NOTE: These packages are updated annually. They contain the current generic service level agreement and appendices. The appendices include the memorandum of understanding with the Deputy Ministers' council, terms of reference with the Shared Services Board of Directors, the service plan of the BC Public Service Agency (BCPSA), a roles and responsibilities matrix, and a records management protocol agreement.

-20	HR account management client files (arrange by client)	SO	nil	DE
-30	HR account management service agreement files (arrange by client)	SO+3y	4y	DE

SO = upon termination of agreement

7y = The seven-year 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).

NOTE: Service agreements outline HR services and costs mutually agreed upon between the BCPSA and clients each year.

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A SA FD

57240 CLIENT SERVICES - EMPLOYEE WORK HISTORY

Records relating to the work history of all regular, part-time, seasonal, auxiliary, and excluded employees appointed under the *Public Service Act* or by order of the Lieutenant Governor in Council.

Human resource staff enter and modify employees' work history in the Corporate Human Resource Information and Payroll System (CHIPS), advise the payroll office of actions or events that affect employees' pay, and provide advice and assistance to line managers.

Record types include correspondence, applications, forms, résumés, orders in council (OICs), copies of degrees, and reports.

For the CHIPS Information System Overview (ISO), see the ISO section.

For disability case management, see secondaries 57420-30 and -35.

For employee health files, see secondaries 57600-20 and -25.

For pay and leave records, see the *Payroll Services ORCS*.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Client Services) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Disciplinary records		SO	nil	DE

SO = upon expiry of the retention period stipulated in the collective agreement and upon receipt of a request from employees to remove the records of disciplinary actions from their employee file, provided that there has been no further infraction

NOTE: Do not open files under this secondary. This secondary provides for the removal and disposition of letters of discipline and other disciplinary records

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

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FD

(including employees' requests for their removal) from an employee's personnel file, provided there has been no further infraction. These records do not include letters of suspension.

NOTE: At a minimum, an employee's personnel file must contain: a copy of their application and/or résumé, a copy of their offer/confirmation letter, OICs for executive and non-executive appointments, personal and emergency contact information, copies of any documents that will confirm job qualifications (e.g., degrees and licences) and which have been verified for authenticity, the oath of employment signed by the employee and a commissioner for taking affidavits for BC, a signed standards of conduct acknowledgement, and a signed Internet Communications Technology Usage Agreement.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57240 CLIENT SERVICES - EMPLOYEE WORK HISTORY (continued)

An employee's personnel file may also contain:
police and criminal record check consent forms and clearances, formal performance evaluations, formal letters of commendation, employee data activity [EDA] reports, copies of social insurance cards, signed temporary assignment agreements, Canadian work visas or equivalent documentation, requests to process pay increases for managers, seniority reports/ summaries, letters of resignation, separation reports, Early Retirement Incentive Program (ERIP) and Voluntary Departure Program (VDP) forms, deferred leave application forms, rehabilitative employment letters, paid absence prior to retirement forms, letters of suspension, discipline records and employees' requests for their removal, and letters advising employees of pay classification changes, assignments and reassignments, in/out of public service transfers, and retroactive classification.

PIB	-30	Employee work history data (currently on CHIPS) (electronic records)	SO+20y	nil	DE
-----	-----	--	--------	-----	----

SO = upon retirement, resignation, or employment termination from the BC public service

20y = The 20-year retention period provides a sufficient historical perspective for trend analysis.

PIB	-40	Health-related absence files (also known as STIIP files) (arrange by employee surname)	SO	10y	DE
-----	-----	--	----	-----	----

SO = upon retirement, resignation, or employment termination from the BC public service

10y = The 10-year semi-active retention period is consistent with the retention period for the related employee personnel file.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SA

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57240 CLIENT SERVICES - EMPLOYEE WORK HISTORY (continued)

FOI: These records would normally form part of an employee's personnel file, but are filed separately to protect the privacy of health information pertaining to employees. Records include page 1 of the Doctor's Certificate Short Term Illness and Injury Plan (STO2), Claims Review Committee and WCB claim appeal decisions, and the following WCB forms if the injury or accident results in time loss or health care costs: employer's report of injury or occupational disease (WCB form 7), first aid report (WCB form 7A), and worker's report of injury or occupational disease to employer (WCB form 6a).

NOTE These files do not contain disability case management information or medical details pertaining to an employee. Disability case management information is filed on secondaries 57420-30 and -35, and employee medical records are filed on the employee health files under secondaries 57600-20 and -25.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57300 COMPENSATION - GENERAL

Records relating to ensuring fair and equitable compensation of employees in the BC public service not shown elsewhere in this primary block. This includes conducting salary surveys, establishing salary schedules, reviewing management salary increase requests, resolving topical compensation issues with bargaining units and ministries, and carrying out related research.

This primary also covers the review and revision of the terms and conditions of employment for employees not covered by the collective agreement (i.e., excluded employees).

Record types include correspondence, spreadsheets, reports, and web site.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Compensation Research and Development) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Compensation intranet web site		SO	nil	DE

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

DE = As the web site is updated, superseded/obsolete versions of documents on it may be destroyed in accordance with approved retention schedules. When the web site is closed, it can be destroyed after relevant schedules have elapsed and/or the documents have been classified elsewhere.

NOTE: This web site provides compensation information to branch staff, as well as approved external users (e.g., ministry/agency strategic human resource staff). It contains salary schedules, salary

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57300 COMPENSATION - GENERAL (continued)

comparisons, benchmarks, approved job evaluation plans and links to the Electronic Classification (E-Class) system and the organization charting tool, HR Charter. Because this is a simple web site, an information system overview for a web site has not been developed.

NOTE: All documents presented on this web site are classified under appropriate secondaries within this *ORCS* or in *ARCS*.

-03 Compensation over-job-rate requests SO+2y 5y DE

SO = when decision is rendered

7y = The seven-year retention period provides sufficient time for research and consultation.

NOTE: This secondary covers requests from deputy ministers for salary increases over the stipulated job rate for particular managers. Program staff review the requests and submit their recommendations to the BC Public Service Agency deputy minister for decision.

-04 Salary schedules SO nil FR

SO = when no longer required for reference purposes

FR = The government archives will fully retain salary schedules because they provide a concise history of BC public service salary rates and rate increases over time. These records document salary ranges, rates and increases for BC public service bargaining unit and excluded positions.

-05 Salary survey files CY+4y nil DE

NOTE: These records document the analysis of external salary surveys to ensure BC public service pay levels are consistent with those in the marketplace.
(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57300	<u>COMPENSATION - GENERAL</u> (continued)			
-20	Bargaining unit compensation files (arrange by bargaining unit)	SO+2y	5y	DE
	SO = upon resolution of issue or completion or cancellation of project			
	7y = The seven-year retention period provides sufficient time for research and consultation.			
	NOTE: Topics addressed in these files include the development of compensation frameworks, temporary market salary adjustments for certain employee groups (e.g., Information Technology employees), collective bargaining preparation, and staff recruitment and retention issues.			
-30	Ministry compensation/classification issue files (arrange by ministry)	SO+2y	5y	DE
	SO = upon resolution of issue			
	7y = The seven-year retention period provides sufficient time for research and consultation.			
	NOTE: Issues addressed in these files concern senior management compensation and classification issues that are ministry-specific.			
-40	Terms and conditions of employment files (arrange by project)	SO+2y	5y	DE
	SO = upon completion or cancellation of proposed change and when no longer required for reference purposes			
	7y = The seven-year retention period provides sufficient time for research and consultation.			
	DE = These records may be destroyed upon the approval of the Records Officer because the proposed			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A

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FD

57300 COMPENSATION - GENERAL (continued)

changes to the terms and conditions are summarized in Treasury Board submissions and if approved, are published in the *Personnel Policy Manual*, which is fully retained by the government archives under secondary 57050-04.

NOTE: These records document changes and updates to the terms and conditions of employment for excluded employees (i.e., those not covered by the collective agreement).

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OPR = Office of Primary Responsibility

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FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57320 COMPENSATION - JOB EVALUATION

Records relating to establishing job benchmarks and developing job evaluation plans in consultation with bargaining unit representatives, as well as conducting workshops and information sessions with ministry managers in order to promote awareness and understanding of the plans.

Job evaluation plans provide a common measuring tool for comparing jobs within an organization. They establish relativity among positions performing different kinds of work. Four primary plans are used in the BC public service, each one designed to evaluate positions represented by particular unions or groups of employees. The four plans are: Public Service Job Evaluation Plan (PSJEP), Licensed Science Officer Job Evaluation Plan (LSO Plan), Management Job Evaluation Plan (MJEP), and Public Service Nurse Classification Plan (PSNCP). The outcome of job evaluation is job classification.

Record types include correspondence, plans, benchmarks, and reports.

For job classification, see primary 57360.

For training and information sessions, see ARCS primary 1735.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Compensation Research and Development) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Job evaluation plan manuals		SO	nil	FR

FR = The government archives will fully retain job evaluation plan manuals because they are the standard measuring tool for evaluating and rating BC public service positions.

Upon publication of each manual, branch staff will

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57320 COMPENSATION - JOB EVALUATION (continued)

box one copy with other records designated for full retention.

-20	Job evaluation plan files (also known as compensation plans) (arrange by bargaining unit, then by coding system)	SO+2y	5y	DE
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SO = when replaced by new job evaluation plan

7y = The seven-year retention period provides sufficient time for research and consultation.

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PIB = Personal Information Bank
PUR = Public Use Records
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CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
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y = year

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A

SA

FD

57360 COMPENSATION - POSITION CLASSIFICATION AND APPEALS

Records relating to the classification of positions and the resolution of classification appeals.

Ministry managers are responsible for defining their employees' duties and responsibilities in job descriptions and submitting approved job descriptions for classification. Classification is the formal evaluation of the relative value of different jobs within an organization. The relative value determines the appropriate salary.

Upon receipt of a classification or reclassification request from a manager, program staff, supported by the Electronic Classification (E-Class) system, analyze the position by assessing it against the appropriate job evaluation plan and benchmark, and if required conduct on-site interviews with the incumbent employee. The new or reclassified position information is entered to the Corporate Human Resource Information and Payroll System (CHIPS).

Employees who are unhappy with the classification decision may appeal the decision. The first level of appeal is a request to the classification officer for a review of the decision. If the employee remains unhappy, the decision may be appealed to the next level, the classification appeals office. If that appeal does not lead to a satisfactory resolution, the appeal may be submitted to adjudication, which results in a final and binding decision.

Record types include correspondence, position exclusion agreements, job descriptions, organization charts, appeal forms, and reports.

For the CHIPS Information System Overview (ISO), see the ISO section.

For the delegation of classification authority, see primary ARCS primary 265.

For the E-Class ISO, see the ISO section.

NOTE: Under the terms of delegation agreements negotiated with ministries pursuant to the *Public Service Act* (s. 6[b]), senior ministry managers may be granted the authority to classify certain jobs. However the signed job description certification and organization chart are submitted and

(continued on next page)

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SA =	Semi-active	FY =	Fiscal Year	DE =	Destruction
FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
OPR =	Office of Primary Responsibility			VR =	Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57360 COMPENSATION - POSITION CLASSIFICATION AND APPEALS (continued)

classified on the relevant file under secondaries -40 or -50,
and the position information is entered to CHIPS.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Compensation Services Delivery) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	CHIPS position information		SO+10y	nil	DE

SO = when deemed redundant

10y = The 10-year retention period is consistent with the
retention period for the E-Class data, classified
under secondary -20.

NOTE: Human resource consultants create and update
positions on CHIPS from information received from
classification staff or ministries delegated to classify
positions.

-03	Classification performance reports		SO	nil	DE
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OPR = Compensation Research and Development Branch

NOTE: These reports are generated by E-Class on an ad-
hoc basis.

-04	Position exclusion agreements		SO	nil	DE
-----	-------------------------------	--	----	-----	----

OPR = Client Services

SO = when no longer required for reference purposes.

NOTE: This is a convenience file of signed one-page
agreements between the employer and unions
(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57360 COMPENSATION - POSITION CLASSIFICATION AND APPEALS (continued)

agreeing to exclude certain positions from bargaining units. These agreements are also classified on the relevant position history file under secondary -50 and the agreement negotiation files under secondary 57520-40.

-20	Classification case management data (currently on E-Class) (electronic records) (includes job descriptions, organization charts, and documents)	SO+10y	nil	DE
-----	--	--------	-----	----

OPR = Compensation Research and Development Branch

SO = when position is redundant, and in the case of linked documents (e.g., job descriptions and classification rationale documents), when replaced by latest version

10y = The 10-year retention period is consistent with the retention period for the generic job files and position history files classified under secondaries -40 and -50.

NOTE: These records date from April 2002. They are used for tracking the progress and status of classification cases, classification review and analysis, and as a reference library of current job descriptions for program staff and ministry managers.

-30	Client ministry classification consultation files (arrange by ministry/agency)	SO	nil	DE
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SO = when no longer required for reference purposes

NOTE: These files contain general classification advice and information provided to client ministries and agencies that do not pertain to specific positions.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57360	<u>COMPENSATION - POSITION CLASSIFICATION AND APPEALS</u> (continued)			
-40	Generic job files (arrange by E-Class number)	SO	10y	FR
	SO = when the job is redundant			
	10y = The 10-year retention period provides sufficient time for research, consultation and potential reactivation of closed files. However, after a lapse of 10 years, it is unlikely that the job will be recreated or the files will have any reference value.			
	FR = The government archives will fully retain generic job files because they provide a history of BC Government jobs over time. These records include generic job descriptions, generic organization charts, and lists of positions matched to the relevant generic job description and organization chart.			
-50	Position history files (arrange by position)	SO	10y	DE
	SO = when the position is redundant			
	10y = The 10-year retention period provides sufficient time for research, consultation and potential reactivation of closed files. However, after a lapse of 10 years, it is unlikely that the position will be recreated or the files will have any reference value			
	NOTE: These files include approved signed job descriptions, organization charts, signed classification authorization documents, classification decision rationale, position exclusion agreements, on-site interview notes, work examples received from incumbent employees and their supervisors, comparative job descriptions and corresponding rationale, and classification appeal decisions.			

(continued on next page)

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			<u>A</u>	<u>SA</u>	<u>FD</u>
57360	<u>COMPENSATION - POSITION CLASSIFICATION AND APPEALS</u> (continued)				
PIB	-60	Step one classification appeal files (arrange by appellant)	SO	2y	DE
		SO = upon conclusion of the appeal and appeal periods			
		2y = The two-year retention period provides sufficient time for consultation.			
		NOTE: This secondary covers the first level of classification appeals. The appeal decisions are also classified on the position history files under secondary -50. If the appeal is elevated to the second level, the contents of these files are copied and filed on the appropriate file under secondary -70.			
PIB	-70	Steps two and three classification appeal files (arrange by appellant)	SO	10y	DE
		OPR = Compensation Research and Development Branch			
		SO = upon conclusion of all appeals and appeal periods			
		10y = The 10-year retention period is based on the need to refer back to similar appeals when making a decision.			
		NOTE: The OPR will store steps two and three classification appeal files under ongoing RCS accession number 91-3869.			
		NOTE: The appeal decisions are also filed on the position history files under secondary -50.			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57400 EMPLOYEE BENEFITS - GENERAL

Records relating to benefits available to eligible BC Government employees not shown elsewhere in this primary block.

This primary covers the administration of optional benefit programs (e.g., Medical Services Plan [MSP], Extended Health, Dental, Deferred Salary Leave, and Benefit Continuation While on Leave without Pay), as well as mandatory life insurance programs (e.g., Group Life and Group Aviation Accident Insurance). This involves responding to inquiries and problems from participating employers, analyzing the provisions and coverage of the plans, tendering and negotiating contracts with plan carriers, and issuing annual reports pursuant to the *Public Service Benefit Plan Act* (RSBC 1996, c. 386, s. 8).

Record types include correspondence, reports, and spreadsheets.

For benefit enrollment and service delivery, see the *Payroll Services ORCS*.

For benefit premium payments, see *ARCS* secondary 925-20.

For benefits accounting, see *ARCS* secondary 910-30.

For benefits receivables, see *ARCS* secondary 935-20.

For the tendering process and negotiation of contracts with plan carriers, see *ARCS* secondary 1080-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Benefits Programs) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	<i>Public Service Benefit Plan Act</i> annual report files		SO+2y	nil	SR

SO = upon publication of the annual report

SR = The government archives will selectively retain these files by retaining the final annual reports.

(continued on next page)

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FD

One copy of each final annual report will be boxed with other records for transfer to the archives.

-20	Benefit administration files (arrange by plan, then by coding system)	SO	7y	DE
-----	--	----	----	----

SO = upon resolution of inquiry, problem, or issue or upon completion of research and analysis, and when no longer required for review and analysis

7y = The seven-year semi-active retention period provides sufficient time for consultation.

NOTE: This secondary covers the resolution of inquiries, problems and issues involving participating employers, as well as research and analysis of various provisions of the plans.

-30	Benefit plan employer files (arrange by employer)	SO	7y	DE
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SO = when no longer participating in the Public Service Benefit Plan

7y = The seven-year retention period ensures that agreements are retained for the six-year limitation period for commencing an action with respect to a contract under the *Limitation Act* (RSBC 1996, c. 266, s.3).

NOTE: This secondary covers employers (other than the BC Government) applying for and/or receiving benefits under the *Public Service Benefit Plan Act*. Records document the approval or denial of coverage, negotiation of agreements with

(continued on next page)

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A

SA

FD

57400 EMPLOYEE BENEFITS - GENERAL (continued)

employers, and plan coverage information,
including effective dates and premium rates.

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57420 EMPLOYEE BENEFITS - DISABILITY CASE MANAGEMENT

Records relating to the case management of employees who are on the Short Term Illness and Injury Plan (STIIP) or equivalent (e.g., Weekly Indemnity [WIN]), Long Term Disability (LTD), or workers' compensation benefits.

This involves monitoring employees on STIIP who may go on to LTD benefits; payment of Medical Services Plan (MSP) premiums for employees on LTD and subsequent issuance of T4s for taxable benefits; presenting complicated or protracted cases to the Rehabilitation Committee for case management recommendations; liaising with the provincial Workers' Compensation Board (currently called WorkSafeBC) on the case management of employees with work-related illnesses or injuries; coordinating return to work plans; submitting eligible claims to the plan carrier for adjudication and payment; coordinating appeals for employees who wish to appeal the carrier's decisions to the Claims Review Committee; and making subrogation claims against third party insurers.

Subrogation refers to the legal process by which the government recovers its STIIP and LTD benefits paid to employees from their settlements with the legally liable third parties (e.g., Insurance Corporation of British Columbia [ICBC]).

Record types include correspondence, forms, reports, minutes, and decisions.

For the Disability Data Management Application (DDMA)/Integrated Case Management System (ICM) Information System Overview (ISO), see the ISO section.

For employee medical files, see secondaries 57600-20 and -25.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Workplace Health & Safety) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57420	<u>EMPLOYEE BENEFITS - DISABILITY CASE MANAGEMENT</u> (continued)			
	-02 Claims Review Committee decisions	SO	nil	DE
	SO = when no longer required for reference purposes			
	NOTE: This secondary covers a convenience collection of decisions made by the Claims Review Committee. The decisions are also filed on the relevant LTD case management file under secondary -30.			
PIB	-04 LTD claims summary cards (arrange by employee surname) (covers summary claims information retained on index cards)	SO	nil	DE
	SO = when no longer required for claims summary reference purposes as determined by the program manager			
	NOTE: Claims summary cards ceased being created after the Disability Data Management Application (DDMA) was implemented in 2001. At the time of implementation, active claims summary information was transcribed from the cards and data entered into DDMA.			
	NOTE: Cards that have been data entered into DDMA/ICM may be destroyed under the Transitory Electronic Data Processing (EDP) Records (Schedule 102902).			
	-20 Disability case and LTD claim management data (currently on DDMA/ICM) (electronic records)	SO+20y	nil	DE
	SO = upon retirement, resignation, or employment termination from the BC public service			

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57420 EMPLOYEE BENEFITS - DISABILITY CASE MANAGEMENT (continued)

20y = The 20-year retention period is consistent with the retention period for employee history data, allows for statistical analysis, and provides a sufficient historical perspective in order to effectively evaluate the performance of disability case management services.

NOTE: This data covers employees who are ill or injured and may be receiving WIN, STIP, LTD or WCB benefits, and includes the Rehabilitation Committee minutes pertaining to relevant employees.

NOTE: This secondary is not for filing. It is used to schedule the data within the system.

PIB	-27	Employee disability tombstone data (currently on DDMA/ICM) (electronic records)	SO+20y	nil	DE
-----	-----	---	--------	-----	----

SO = upon retirement, resignation or employment termination from the BC public service

20y = The 20-year retention period is consistent with the retention period for employee history data and allows for employment verification relating to historical WorkSafeBC claims.

NOTE: Tombstone data may not include all employees to whom the BCPSA provides benefit services.

NOTE: This secondary is not for filing. It is used to schedule the data within the system.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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			<u>A</u>	<u>SA</u>	<u>FD</u>
57420	<u>EMPLOYEE BENEFITS - DISABILITY CASE MANAGEMENT</u> (continued)				
PIB	-30	LTD case management files (includes application forms and supporting documentation, claims correspondence with insurance carrier, medical reports, position description forms, direct deposit authorizations, disability case management reports, benefit statements, and general correspondence) (arrange by employee surname)	SO	20y	DE
SO = when case is closed (i.e., employee requalifies for STIIP or LTD benefits by clearing the successive disabilities timeframe specified in the <i>Long Term Disability Plan Regulation</i> [BC Reg. 409/97, s. 2.7]) and outstanding issues [e.g. return to work, grievance, or arbitration] are concluded					
20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee is again on STIIP, WIN, LTD or workers' compensation benefits.					
NOTE: The OPR will store LTD case management files under ongoing RCS accession number 91-3855.					
NOTE: The LTD case management file together with the Disability case management file (classified under secondary -35) comprise the complete disability case management file for employees on LTD. These files are currently managed separately because staff are located in separate buildings.					
PIB	-35	Disability case management files (includes correspondence, rehabilitation committee applications, return to work documentation, forms, worksheets, and may include medical information if volunteered by the employee) (arrange by employee surname)	SO	20y	DE

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57420 EMPLOYEE BENEFITS - DISABILITY CASE MANAGEMENT (continued)

SO = when case is closed (i.e., employee requalifies for STIIP or LTD benefits by clearing the successive disabilities timeframe specified in the *Long Term Disability Plan Regulation* [BC Reg. 409/97, s. 2.7]) and outstanding issues [e.g. return to work, grievance, or arbitration] are concluded

20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee is again on STIIP, WIN, LTD or workers' compensation benefits.

NOTE: The OPR will store Disability case management files under ongoing RCS accession number 90-7938.

NOTE: A Disability case management file is opened when a Disability Case Manager becomes involved with an employee who is on STIIP, WIN or LTD. If the employee applies for LTD, a LTD case management file (secondary -30) will also be opened.

PIB	-40	MSP and group life payment tracking and T4 data (currently on DDMA/ICM) (electronic records)	FY+7y	nil	DE
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8y = The eight-year retention period is based on the six-year assessment period under the *Income Tax Act* (RSC 1985, c. 1 (5th Supp.), s. 230(4)) and is consistent with the retention period for accounts payable and reconciliation records in ARCS.

NOTE: The branch is responsible for the payment of applicable MSP and group life premiums for employees on LTD; they receive the data for reconciliation and bill payment purposes. Amounts paid are then used to produce T4s for taxable benefits.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57420 EMPLOYEE BENEFITS - DISABILITY CASE MANAGEMENT (continued)

NOTE: This secondary is not for filing. It is used to schedule the data within the system.

PIB	-45	Subrogation files (includes correspondence with insurance carriers, legal documents, mediation briefs, settlement documents, absence verification documents, payroll and human resources printouts, copies of cheques and other financial documentation, report of accident questionnaire, DDMA screen shots and grievance records) (arrange by employee surname)	SO	20y	DE
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SO = when case is closed (i.e., employee requalifies for STIIP or LTD benefits by clearing the successive disabilities timeframe specified in the *Long Term Disability Plan Regulation* [BC Reg. 409/97, s. 2.7]) and outstanding issues [e.g. return to work, grievance, or arbitration] are concluded

20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee is again on STIIP, WIN, LTD or workers' compensation benefits.

NOTE: Subrogation files were previously classified under secondary 57420-30

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57440 EMPLOYEE BENEFITS - DISABILITY PROGRAM MANAGEMENT

Records relating to disability program management. This involves the development and administration of short and long term disability plans (e.g., Short Term Illness and Injury Plan [STIIP], Weekly Indemnity [WIN], and Long Term Disability [LTD]), analysis of disability claims, and consultation with and direction to plan carriers.

Record types include correspondence, forms, and reports.

For LTD carrier contracts, see ARCS secondary 1080-20.

For LTD Fund cost recovery, see ARCS secondary 1190-20.

For the Rehabilitation Committee, see ARCS secondary 200-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Disability Management Programs) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Carrier consultation and direction correspondence		CY+2y	7y	DE

10y = The 10-year retention period provides sufficient time for research and consultation, and ensures that the information will be dated and have little reference value.

-03	Carrier reports - annual		CY+2y	7y	DE
-----	--------------------------	--	-------	----	----

10y = The 10-year retention period provides sufficient time for research and consultation, and ensures that the information in the reports will be dated and have little reference value.

NOTE: These reports summarize the number and types of claims processed by the LTD plan carrier each year.

(continued on next page)

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PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57440	<u>EMPLOYEE BENEFITS - DISABILITY PROGRAM MANAGEMENT</u> (continued)			
-04	Carrier reports - monthly	SO	nil	DE
	SO = upon receipt of the related annual report			
-20	LTD program management files (arrange by plan components [e.g., return to work plans, rehabilitative work placements, compassionate transfers, and Rehabilitation Committee])	SO	7y	DE
	SO = when no longer required for review and analysis			
	7y = The seven-year semi-active retention period provides sufficient time for consultation.			
-30	STIIP program management files (arrange by plan provisions)	SO	7y	DE
	SO = when no longer required for review and analysis			
	7y = The seven-year semi-active retention period provides sufficient time for consultation.			
	NOTE: This secondary covers equivalent plans such as WIN and the former Sick Leave Plan.			

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y = year

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57460 EMPLOYEE BENEFITS - EMPLOYEE AND FAMILY ASSISTANCE

Records relating to the management of the Employee and Family Assistance Program (EFAP). EFAP is an assessment, counselling and referral service available to eligible employees and their families to help them with their personal problems. A service provider delivers the program and retains control and ownership of the client records it creates.

This primary covers the development of the program, as well as the administration of interest-free loans, which are available to eligible employees to attend residential alcohol and drug treatment programs.

Record types include correspondence, reports, spreadsheets, forms, agreements, and copies of cheques.

For the tendering process and negotiation of contract with service provider, see ARCS secondary 1080-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Disability Management Programs) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

PIB	-20	EFAP loan files (arrange by employee surname)	SO	7y	DE
-----	-----	--	----	----	----

SO = upon repayment of the loan or when written off

7y = The seven-year retention period ensures that loan agreements are retained for the six-year limitation period for commencing an action with respect to a contract under the *Limitation Act* (RSBC 1996, c. 266, s.3).

(continued on next page)

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A SA FD

57460 EMPLOYEE BENEFITS - EMPLOYEE AND FAMILY ASSISTANCE
(continued)

NOTE: EFAP loans have an established threshold amount (currently to a maximum of \$2,000). If the employee resigns or is terminated prior to full repayment of the loan, the outstanding amount is recovered if possible from final pay; otherwise, a letter is sent to the former employee demanding payment.

-30 EFAP program files SO 7y DE
(arrange by program components)

SO = when replaced by new program

7y = The seven-year semi-active retention period provides sufficient time for consultation.

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A SA FD

57480 EMPLOYEE BENEFITS - WCB CLAIM APPEALS

Records relating to representing the employer in appeals before the Review Division of the provincial workers' compensation board (WCB) (currently called WorkSafeBC) and further appeals before the Workers' Compensation Appeal Tribunal. Appeals may involve the initial acceptance or denial of the claim, relief of cost, as well as appeals of ongoing WCB decisions on the claim (e.g., pension amounts or vocational retraining).

This primary also covers the management of the WCB claims program, including the development of claims procedures for ministries and agencies, claim cost analysis, and responses to WCB policy and practice changes.

Record types include correspondence, reports, appeal notices, CD-ROMs, and decisions.

For the Disability Data Management Application (DDMA)/Integrated Case Management System (ICM) Information System Overview (ISO), see the ISO section.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Disability Management Programs) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

PIB	-20	WCB claim appeal files (arrange by employee surname)	SO	7y	DE
-----	-----	---	----	----	----

SO = upon conclusion of all appeals and appeal periods

7y = The seven-year retention period provides sufficient time for consultation.

(continued on next page)

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A SA FD

57480 EMPLOYEE BENEFITS - WCB CLAIM APPEALS (continued)

NOTE: The OPR will store WCB claim appeal files under ongoing RCS accession number 91-4112.

NOTE: Records include copies of the contents of the WCB claim file (which in recent years is contained on a CD-ROM), notices of appeal, and final decisions. The final decisions are also filed on the relevant health-related absence files under secondary 57240-40.

NOTE: These records document WCB claim appeals since 1998. Prior to 1998, WCB claim appeals were the responsibility of the ministries.

PIB	-30	WCB claim cost data (currently on DDMA/ICM) (electronic records)	SO+20y	nil	DE
-----	-----	--	--------	-----	----

SO = after last claim cost received or upon conclusion of all appeals and appeal periods

20y = The 20-year retention period provides a sufficient historical perspective for research and analysis and is consistent with the semi-active retention period for the disability case management data classified under secondary 57420-20.

	-40	WCB claims program management files (arrange by program component)	SO	7y	DE
--	-----	---	----	----	----

SO = when no longer required for review and analysis

7y = The seven-year semi-active retention period provides sufficient time for consultation.

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A SA FD

57500 LABOUR RELATIONS - GENERAL

Records relating to employer-employee relations in the BC public service not shown elsewhere in this primary block.

This primary covers the Labour Relations (LR) Practitioner's Worksite, the provision of advice and support to line managers and ministry executives on labour relations matters, strike and essential service planning, and special projects.

Record types include correspondence, reports, plans, and web site.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Labour Relations Branch) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	LR Practitioner's Worksite (electronic records)		SO	nil	DE

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

DE = As the web site is updated, superseded/obsolete versions of documents on it may be destroyed in accordance with approved retention schedules. When the web site is closed, it can be destroyed after relevant schedules have elapsed and/or the documents have been classified elsewhere.

NOTE: This web site provides labour relations information to branch staff, as well as approved external human resource and labour relations practitioners. It contains the employer's interpretation of the collective agreement, indices to arbitration awards and Labour Relations Board (LRB) decisions, links from the indices to the electronic version of the

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A SA FD

57500 LABOUR RELATIONS - GENERAL (continued)

Because this is a simple web site, an information system overview for a web site has not been developed

NOTE: All documents presented on this web site are classified under appropriate secondaries within this *ORCS* or in *ARCS*.

-20	Labour relations client files (arrange by client)	SO	nil	DE
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OPR = regional labour relations specialists

NOTE: These records document advice to clients on employee relations and performance matters to assist in averting or resolving workplace conflict, as well as advice on the interpretation and application of collective agreements, general terms and conditions of employment, and employment-related legislation and policies.

-30	Labour relations project files (arrange by project)	SO	nil	DE
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SO = upon completion or cancellation of project, and when no longer required for reference purposes

NOTE: This secondary covers projects that support labour relations activities (e.g., employee transfers from and to the BC Government through privatization or the dissolution of Crown corporations).

-40	Strike and essential service planning files (arrange by ministry, issue, or subject, whichever is appropriate)	SO	nil	FR
-----	---	----	-----	----

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

(continued on next page)

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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL 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 *ORCS* has been implemented according to standards approved by Corporate Information Management Branch. For assistance in implementing *ORCS*, contact your Records Officer.

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SA

FD

57500 LABOUR RELATIONS - GENERAL (continued)

FR = The government archives will fully retain strike and essential service planning files because they significantly document the Government of BC's plans and strategies for responding to strikes by its unions.

NOTE: These files include strike contingency plans and essential service plans received from the ministries.

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57520 LABOUR RELATIONS - BARGAINING AND NEGOTIATIONS

Records relating to acting as the bargaining agent for the BC Government in the negotiation of all collective agreements, memoranda of agreement, transfer agreements, and position exclusions.

Record types include correspondence, proposals, reports and agreements.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Labour Relations Branch) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Collective agreements and memoranda of agreement		SO	nil	FR

SO = upon termination of agreement and expiry of the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s.3), and when no longer required for reference purposes

FR = The government archives will fully retain collective agreements and memoranda of agreement because they provide a history of the terms and conditions of employment for bargaining unit employees.

NOTE: This secondary covers negotiated collective agreements and corresponding memoranda of agreement (MOAs). MOAs are created for each negotiated change from the previous collective agreement.

-20	Collective agreement interpretation files (arrange by article number)		SO	nil	DE
-----	--	--	----	-----	----

SO = when no longer required for reference purposes

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57520 LABOUR RELATIONS - BARGAINING AND NEGOTIATIONS (continued)

DE = These files may be destroyed upon approval of the Records Officer because formal arbitration awards and award decisions, which are fully retained under secondary 57540-03 provide legal interpretations of the collective agreement.

NOTE: This secondary covers the employers' unilateral interpretation of the collective agreement.

-30	Collective bargaining binders (includes proposals, copies of MOAs, and notes) (arrange by bargaining unit, then by sequential number)	SO	nil	FR
-----	---	----	-----	----

SO = upon termination of agreement and expiry of the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s.3), and when no longer required for reference purposes

FR = The government archives will fully retain the collective bargaining binders because they document the positions of the BC Government and its unions during the collective bargaining process.

-40	Exclusion of positions negotiation files (arrange by ministry, then by <i>Public Service Labour Relations Act</i> section number, or if possible by position)	SO	nil	DE
-----	--	----	-----	----

SO = upon conclusion of negotiations and, if relevant upon expiry of agreement and the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s.3), and when no longer required for reference purposes

DE = These files may be destroyed upon approval of the Records Officer because exclusion agreements are fully retained under secondary 57360-40.

NOTE: This secondary covers discussions and negotiations

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57520 LABOUR RELATIONS - BARGAINING AND NEGOTIATIONS (continued)

with the unions to exclude certain positions from bargaining units.

-50	Transfer agreements for bargaining unit employees (arrange by bargaining unit, then by sequential number)	SO	nil	FR
-----	---	----	-----	----

SO = upon termination of agreement and expiry of the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s.3), and when no longer required for reference purposes

FR = The government archives will fully retain transfer agreements because they document the transfer of bargaining unit employee rights from and to the BC Government.

NOTE: Transfer agreements cover the negotiated transfer of collective agreement rights (e.g., compensation, pension, and seniority) for employees transferred from or to the BC Government (e.g., through privatization or dissolution of Crown corporations).

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PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57540 LABOUR RELATIONS - DISPUTE RESOLUTION

Records relating to representing the employer in the conduct of all disputes arising from collective agreements and/or employment-related legislation, including disputes filed by excluded employees and grievances filed by bargaining unit employees, as well as human rights complaints and hours of work disputes.

This involves supporting supervisors, managers and executives in the early stages of the dispute resolution process, analysis of employment law, and presenting cases or instructing legal counsel at arbitration or before the Labour Relations Board or other administrative tribunals.

Record types include correspondence, reports, forms, and decisions.

For the Grievance Tracking System Information System Overview (ISO), see the ISO section.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Labour Relations Branch) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Expedited arbitration decisions (arrange by sequential number)		SO	nil	FR

SO = when no longer required for reference purposes

FR = The government archives will fully retain expedited arbitration decisions because they document significant grievances, and have significant evidential and informational value in documenting employer and employee relations.

NOTE: This secondary covers a collection of expedited arbitration decisions. Copies are also filed in the arbitration files classified under secondary -40.
(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57540 LABOUR RELATIONS - DISPUTE RESOLUTION (continued)

NOTE: Expedited arbitrations are much quicker than formal arbitrations, with a decision usually rendered the same day as the hearing. Instead of witnesses being called, an agreed statement of facts is presented to the arbitrator by the employer and union or association. Expedited arbitration is used for less complicated cases (e.g., disciplinary) and is not precedent setting.

-03	Formal arbitration awards and appeal decisions (arrange by sequential number)	SO	nil	FR
-----	--	----	-----	----

SO = when no longer required for reference purposes

FR = The government archives will fully retain formal arbitration awards and appeal decisions because they document significant grievances and establish legal precedent. These records have significant evidential and informational value in documenting employer and employee relations.

NOTE: This secondary covers a collection of formal arbitration decisions. Copies are also filed in the arbitration files under secondary -40.

NOTE: Formal arbitrations are similar to court proceedings, but less formal. The hearing may last several days depending on the issue and the number of witnesses heard. The union or association and employer both present their sides of the matter. The arbitrator reviews the presentations, makes a decision and issues a written binding award. Should either party not abide by the award, the arbitrator's award may be filed with the courts and become an order of the court.

-04	Grievance arbitration tracking reports (electronic records)	SO	nil	DE
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57540 LABOUR RELATIONS - DISPUTE RESOLUTION (continued)

SO = when no longer required for consultation and analysis

PIB	-20	Excluded employee dispute resolution files (arrange by employee surname)	SO	10y	DE
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OPR = Workforce restructuring services

SO = when dispute is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

10y = The 10-year semi-active retention period provides a reasonable length of time for consultation.

NOTE: This secondary covers the resolution of disputes involving employees not covered by collective agreements. The dispute resolution process is described in the *Personnel Policy Manual* classified under primary 57050.

-30	Grievance files (step 2) (arrange by bargaining unit, then by the number of the collective agreement article under dispute)	SO	10y	DE
-----	--	----	-----	----

OPR = regional labour relations specialists

SO = when grievance is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

10y = Ministry legal counsel have advised that the 10-year semi-active retention period provides a reasonable length of time for review and consultation.

NOTE: This secondary covers grievances resolved under step 2 of the collective agreement grievance

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57540 LABOUR RELATIONS - DISPUTE RESOLUTION (continued)

process (step 1 grievances are handled by the employee's supervisor). If step 2 fails to resolve the dispute, the grievance may be referred to binding arbitration (secondary -40).

-40	Grievance arbitration files (arrange by bargaining unit, then by the number of the collective agreement article under dispute)	SO	nil	DE
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SO = when grievance is withdrawn or settled, or upon conclusion of arbitration and expiry of appeal periods and appeals, and when no longer required for reference purposes

DE = Grievance arbitration files can be destroyed because they are sufficiently summarized in secondary 57540-03 (formal arbitration awards and appeal decisions).

NOTE: This secondary covers expedited and formal arbitrations, as well as grievances that were filed for arbitration but withdrawn or settled prior to the arbitration process.

NOTE: Records include interpretations of the collective agreement, copies of the contents of the grievance files, copies of applicable policies, notes, arbitration notifications, written arguments, and awards.

PIB	-45	Grievance arbitration tracking (currently on Grievance Tracking System) (electronic records)	SO	nil	DE
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SO = when grievance is withdrawn or settled, or upon conclusion of arbitration and expiry of appeal periods and appeals, and when no longer required for research and analysis

PIB	-50	Hours of work dispute files (arrange by complainant)	SO	nil	DE
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(continued on next page)

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A SA FD

57540 LABOUR RELATIONS - DISPUTE RESOLUTION (continued)

SO = when dispute is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

NOTE: This secondary covers hours of work disputes resolved under the provisions of the collective agreement. The records consist of all decisions made by hours of work umpires and cases in which the Labour Relations Branch is involved.

PIB	-60	Human rights complaint files (arrange by complainant)	SO	nil	FR
-----	-----	--	----	-----	----

SO = when complaint is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

FR = The government archives will fully retain human rights complaint files because they document significant human rights cases involving government employees. These records have significant evidential and informational value in documenting employer and employee relations.

NOTE: This includes discrimination and personal and sexual harassment complaints filed under the collective agreement and under the *Human Rights Code* (RSBC 1996, c. 210).

PIB	-70	Labour relations complaint files (arrange by relevant statute, then by complainant)	SO	nil	FR
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SO = when complaint is withdrawn, abandoned, granted or settled, and upon expiry of appeal periods and appeals, and when no longer required for reference purposes

FR = The government archives will fully retain labour relations complaint files because they document
(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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A

SA

FD

57540 LABOUR RELATIONS - DISPUTE RESOLUTION (continued)

significant disputes between the union and the employer and the employer and its employees. These files also include union and employee disputes that serve to interpret the collective agreement.

NOTE: This secondary covers complaints filed under the *Labour Relations Code* (RSBC 1996, c. 244), *Public Service Labour Relations Act* (RSBC 1996, c. 388), and *Employment Standards Act* (RSBC 1996, c. 113). This includes employee complaints against the union which are of interest to the branch (e.g., duty of fair representation), employee complaints against the employer for contraventions of the *Employment Standards Act* (e.g., wrongful dismissal), and employer complaints against the union (e.g., unlawful picketing and essential service designation disputes).

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CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
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y = year

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57600 OCCUPATIONAL HEALTH

Records relating to the health of BC Government employees. This involves medical assessments of employees on sick leave and long term disability and their fitness to return to work; medical examinations of prospective employees for positions that require physical competency screening; and vaccinations against influenza and the hepatitis B virus for employees at risk of occupational exposure.

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

For a description of the systems related to occupational health records, see the Systems Section.

The ministry OPR is BC Public Service Agency, Occupational Health & Rehabilitation unless otherwise noted below. See specific secondaries for OPR retention schedules.

	A	SA	FD
All non-OPR offices will retain these records for:	SO	nil	DE
-00 Policy and procedures	SO	5y	FR
RETENTION STATEMENT: Transfer to the government archives five years after the policy is replaced or becomes irrelevant. SO: when the policy is replaced or becomes irrelevant FR: The government archives will fully retain final versions of operational policy documentation because these records provide significant evidence of the governance of the functions and programs covered by this schedule.			
-01 General	CY+1y	nil	DE
RETENTION STATEMENT: Destroy at the end of the second calendar year.			
-02 Hepatitis B vaccination forms (no health file)	SO	10y	DE
RETENTION STATEMENT: Destroy 10 years after resignation, employment termination, or retirement from the BC public service, or death while in service.			

SO: upon resignation, employment termination, or retirement from the BC public service, or death while in service

10y: The semi-active retention period satisfies the minimum ten-year retention for vaccination records specified by the *Occupational Health & Safety Guidelines* from WorkSafeBC and provides a reasonable length of time for consultation.

NOTE: This secondary covers hepatitis B vaccination forms of employees who do not have an existing health file. Forms pertaining to employees with existing employee health files are classified under secondary -20.

-03	Influenza vaccination forms (no health file)	CY	10y	DE
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RETENTION STATEMENT:

Destroy at the end of the 11th calendar year.

11y: The retention period satisfies the minimum 10-year retention for vaccination records specified by the *Occupational Health & Safety Guidelines* from WorkSafeBC and provides a reasonable length of time for consultation.

NOTE: This secondary covers influenza vaccination forms of employees who do not have an existing health file. Forms pertaining to employees with existing employee health files are classified under secondary -20.

PIB	-04	Pre-placement examinations (candidates not hired)	CY	16y	DE
-----	-----	--	----	-----	----

RETENTION STATEMENT:

Destroy at the end of the 17th calendar year.

17y: The retention period satisfies the minimum 16-year retention for patient records specified by the College of Physicians and Surgeons of BC in the *Health Professionals Act* (RSBC 1996, c.183) and provides a reasonable length of time for consultation.

NOTE: These records document pre-placement physical examinations (e.g., vision, hearing, strength, endurance, and manual dexterity) of job candidates who do not meet the

medical guidelines for fitness for the positions which they are applying.

NOTE: Pre-placement examinations of job candidates who are certified as fit to perform their prospective jobs are classified on the relevant employee health file under secondary -20.

-07	Sick leave forms	SO	nil	DE
-----	-------------------------	----	-----	----

(includes the portion of the Doctor's Certificate Form [STO2] containing the Physicians Confidential Report, and other medical notes sent to Occupational Health and Rehabilitation)

RETENTION STATEMENT:

Destroy when no longer required for reference or quality control purposes and have been uploaded to the occupational health database.

SO: when no longer required for reference or quality control purposes and have been uploaded to the occupational health database

DE: Sick leave forms can be destroyed because copies of the forms are uploaded to the occupational health database where they are kept in the relevant employee health file under secondary -20.

NOTE: The Doctor's Certificate Form (STO2) contains confidential diagnostic information and features two parts. Only the Physicians Confidential Report, known as the long form, is retained by Occupational Health and Rehabilitation. Before 2014 the Physicians Confidential Report was on page 2 of the form but is now found on page 1.

PIB	-20	Employee health files (no exposure)	SO	16y	DE
-----	-----	--	----	-----	----

(includes sick leave forms, Rehabilitation Committee applications, chart notes, medical opinion letters, pre-placement clearance letters, and consent forms)
(arrange by employee surname)

RETENTION STATEMENT:

Destroy 16 years after resignation, employment termination, or retirement from the BC public service, or death while in service.

SO: upon resignation, employment termination, or retirement from the BC public service, or death while in service

16y: The semi-active retention period satisfies the minimum 16-year retention for patient records specified by the College of Physicians and Surgeons of BC in the *Health Professionals Act* (RSBC 1996, c.183) and provides a reasonable length of time for consultation.

NOTE: This secondary covers employee health files and related records that do not document exposure to latent occupational hazards.

-25	Latent biological hazard exposure files (includes STO2 forms until April 2005, Rehabilitation Committee applications, chart notes, medical opinion letters, pre-placement clearance letters, and consent forms) (arrange by employee surname)	SO	30y	DE
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RETENTION STATEMENT:

Destroy 30 years after resignation, employment termination, or retirement from the BC public service, or death while in service.

SO: upon resignation, employment termination, or retirement from the BC public service, or death while in service

30y: The 30-year semi-active retention period provides a reasonable length of time for the effects of the exposure to occur.

NOTE: This secondary covers employee health files and related records that document exposure to latent occupational biological hazards, the effects of which may occur years later (e.g., asbestos, blood borne pathogens, and radiation).

END OF PRIMARY

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57650 OCCUPATIONAL SAFETY SUPPORT

Records relating to the provision of occupational safety support to BC Government ministries and agencies. Support activities include establishing occupational safety and health (OSH) management policies and practice guidelines, developing OSH management support tools and systems, providing advice and assistance to organizations and managers, and representing the public service on OSH matters.

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

For the First Aid Assessment Tool Information System Overview (ISO), see the ISO section.

NOTE: Ministries and agencies are responsible for developing and maintaining OSH programs within their organizations. Those records are classified under *ARCS*.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Occupational Safety Programs) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	BC public service representation on OSH matters (electronic records) (includes correspondence, position papers, and submissions)		SO	nil	DE

SO = when concerns or issues are resolved, and when no longer required for reference purposes

DE = These files may be destroyed upon approval of the Records Officer as they are copies of records either retained in a more complete form and proper context by the provincial workers' compensation board (WCB) (currently called WorkSafe BC), or the

(continued on next page)

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PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

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A SA FD

57650 OCCUPATIONAL SAFETY SUPPORT (continued)

resolution of the issue or concern is reflected in the *Personnel Policy Manual* and the OSH practice guidelines, which are fully retained by the government archives under secondaries 57050-03 and -04 and 57000-02 respectively.

NOTE: These records document the representation of the BC public service's interests with OSH stakeholders such as WorkSafe BC, public service unions, and BC-based employer's forums.

-03	First aid needs assessment information (electronic records) (includes spreadsheets)	SO+3y	nil	DE
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SO = when replaced by new assessment

NOTE: These records are currently on the First Aid Needs Assessment Tool. They date from March 2005.

-04	First aid needs assessment notification reports (electronic records)	SO	nil	DE
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SO = when report is sent to the relevant ministry or agency strategic human resources office, and when no longer required for reference purposes

NOTE: These reports are generated from the First Aid Needs Assessment Tool. They list the worksites in each ministry/agency that have completed their first aid needs assessments.

-20	OSH client files (includes correspondence, activity sheets, contact documents, and case tracking data) (arrange by client)	SO	2y	DE
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OPR = regional occupational safety advisors

SO = when issue is resolved and unlikely to be reopened
(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57650 OCCUPATIONAL SAFETY SUPPORT (continued)

2y = The two-year semi-active retention period provides sufficient time to ensure these files are no longer required.

NOTE: These records document OSH advice and guidance given to client ministries and agencies.

-30	OSH policy and guideline project files (electronic records) (includes correspondence, discussion papers, reports, and draft guidelines and policies) (arrange by project)	SO	nil	DE
-----	---	----	-----	----

SO = when project is completed, closed, or cancelled,
and when no longer required for reference purposes

DE = These records may be destroyed upon approval of the Records Officer because they are incorporated in the *Personnel Policy Manual* and OSH practice guidelines, which are fully retained by the government archives under secondaries 57050-03 and -04 and 57000-02 respectively.

NOTE: This secondary covers the development of OSH policies and practice guidelines.

A = Active
SA = Semi-active
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A SA FD

57800 TALENT MANAGEMENT - GENERAL

Records relating to securing, developing, advancing, and motivating talented employees not shown elsewhere in this primary block.

This primary covers projects and strategies designed to enhance employee's skills and development, manage and reward employee performance, integrate diversity and human rights principles and practices into daily operations, and determine staffing requirements through workforce planning and analysis.

Record types include correspondence, reports, guides, discussion and issue papers, and copies of briefing notes.

For contracts, see ARCS secondary 1070-20.
For hiring strategies and projects, see primary 57870.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Talent Management Division) will retain these records for:

SO 10y 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		CY+1y	nil	DE
-02	Talent management project/strategy final documents		SO	nil	FR

FR = The government archives will fully retain talent management project/strategy final documents because they describe the BC public service's plans and strategies for securing, developing, advancing, and motivating its employees.

One copy of each final project or strategy document will be printed upon completion, and then boxed with other records designated for full retention.

NOTE: This secondary includes final corporate strategy reports (e.g., *The Future of Employee Learning: A Learning Strategy for the Public Service of British*

(continued on next page)

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PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

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FD

Columbia, 2002) and branch annual reports (e.g., the Leadership and Learning Centre's 2004/05 annual report).

- NOTE: These projects involve the development of tools and resources that will infuse diversity and human rights thinking into the work environment.

- 40 Performance management project files
(arrange by project)

NOTE: These projects involve the development of guides and resources for managers and supervisors to evaluate, improve, and reward performance.

- 50 Workforce planning project files
(arrange by project)

NOTE: These projects involve the initiation and development of the workforce planning program, which will require ministries to regularly report on their staffing and skill set requirements.

SO = when project or strategy is completed, closed, or cancelled,
and when no longer required for reference purposes

10y = The 10-year retention period provides sufficient time for research and consultation, and ensures that the information will be dated and have little reference value.

DE = These files may be destroyed upon the approval of the Records Officer because final documents will be fully retained by the government archives under secondary -02.

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57820 TALENT MANAGEMENT - EMPLOYEE LEARNING

Records relating to cross-government employee learning and training. This involves identifying common learning needs across the BC public service, planning the curriculum, managing course development and delivery contracts, and reviewing and evaluating courses.

The training records of individual employees are entered to the Corporate Human Resource Information and Payroll System (CHIPS) and classified under secondary -50.

Record types include correspondence, reports, notes, manuals, workbooks, handouts, presentation slides, and other types of records as indicated under relevant secondaries.

For the CHIPS Information System Overview (ISO), see the ISO section.

For committees (e.g., Curriculum Advisory Committee), see ARCS secondary 204-20.

For contracts, see ARCS secondary 1070-20.

For learning projects and strategies, see secondary 57800-30.

For ministry-specific training, see ARCS primary 1735.

For training budget and related records, see ARCS primaries 1000 to 1050.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Learning Services Branch) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Communities of practice		SO	nil	DE

NOTE: This secondary provides information on the establishment and operation of communities of practice, which are informal groups of like-minded employees who share knowledge and resources.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57820	<u>TALENT MANAGEMENT - EMPLOYEE LEARNING</u> (continued)			
-03	Competency frameworks	SO	nil	DE
	NOTE: This secondary covers knowledge, skill and behaviour competencies for various job types (e.g., finance, management, and communication). They are based on internal surveys and private sector research (e.g., Hay Group Inc.).			
-04	Learning needs analysis (includes learning plans)	SO	nil	DE
-05	Training evaluations (includes forms and summary sheets)	SO	nil	DE
-06	Training packages	SO	2y	DE
	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	Course development files (arrange by course name)	SO	2y	DE
-25	Course 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 course sponsors, facilities, aids, and resources used.			
-30	Curriculum planning files (arrange by curriculum area, then course)	SO	2y	DE
PIB	-40 Educational fee reimbursement requests (includes correspondence, applications, and receipts)	SO	2y	DE

(continued on next page)

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FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
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OPR =	Office of Primary Responsibility			VR =	Vital Records

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A SA FD

57820 TALENT MANAGEMENT - EMPLOYEE LEARNING (continued)

(arrange by employee)

SO = when decision rendered; and if approved, when fee paid out

NOTE: This secondary covers applications from employees for the reimbursement of educational and professional development fees.

PIB	-50	Employee training records (currently on CHIPS) (electronic records) (arrange by employee)	SO+20y	nil	DE
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SO = upon retirement, resignation, or employment termination from the BC public service

20y = The 20-year semi-active retention period is consistent with the retention period for employee work history data classified under secondary 57240-30.

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PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57830 TALENT MANAGEMENT - EMPLOYEE RECOGNITION

Records relating to the development and administration of cross-government employee recognition programs (e.g., Premier's Innovation and Excellence Awards, Improvement Awards, Staff Appreciation Awards, Long Service Awards, Public Service Week, and informal recognition programs).

This involves developing the eligibility guidelines and selection criteria for the recognition programs; receiving and publicizing the names and contributions of award or recognition recipients; handling award decision appeals (e.g., Improvement Awards Program); and in the case of the Premier's Innovation and Excellence Awards, coordinating the selection of recipients and planning the award ceremony.

Record types include correspondence, applications, rating forms, news releases, newspaper advertisements, brochures, video recordings, reports, and web site.

For the Employee Recognition System (ERS) Information System Overview (ISO), see the ISO section.

For the Long Service Award Registration System (LSARS) ISO, see the ISO section.

For the Ministry Recognition Contacts Committee, see ARCS secondary 204-20.

For ministry-specific recognition programs, see ARCS primary 1310.

Unless otherwise specified below, the ministry OPR (BC Public Services Agency, Learning Services Branch) 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	5y	FR
	(covers eligibility guidelines and selection criteria)	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-02	Employee recognition activity reports		SO	nil	FR
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SO = when no longer required for review and analysis

(continued on next page)

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57830 TALENT MANAGEMENT - EMPLOYEE RECOGNITION (continued)

FR = The government archives will fully retain employee recognition activity reports because they provide a concise summary of the BC Government's recognition of its employees, including the number of employees recognized and the types of recognition received.

-03	Long service award inquiries	CY+2y	nil	DE
-04	Long service award recipient spreadsheets (electronic records)	CY+2y	nil	DE
-05	Premier's Award plans and ceremony materials (includes correspondence, program guides, newspaper advertisements, and video recordings)	CY+2y	nil	SR

SR = The government archives will selectively retain Premier's Innovation and Excellence Award plans and ceremony materials by retaining the ceremony program guides because they summarize nominated ideas and initiatives.

NOTE: This secondary covers ceremony planning records, as well as promotional information.

-06	Recognition web sites (electronic records)	SO	nil	DE
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SO = when the web sites are altered, updated, redesigned or closed

DE = As the web sites are updated, superseded/obsolete versions of documents on them may be destroyed in accordance with approved retention schedules. When the web sites are closed, they can be destroyed after relevant schedules have elapsed and/or the documents have been classified elsewhere.

(continued on next page)

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A SA FD

57830 TALENT MANAGEMENT - EMPLOYEE RECOGNITION (continued)

NOTE: These web sites comprise the Awards and Recognition web site (<http://www.bcpublicservice.ca/awards/>), Premier's Awards web site (<http://www.bcpublicservice.ca/premiersawards/index.htm>), Public Service Week web site (<http://www.bcpublicservice.ca/pswk2005/>), and the "Recognition Component" of the Manager's HR Toolkit (<http://www.hrtoolkit.gov.bc.ca/recognition/>). These web sites provide information about recognition programs, identify recipients, and include reference and resource material (e.g., articles, quotes, tips, and best practices).

Because these are simple web sites, an information system overview for a web site has not been developed

NOTE: All documents presented on these web sites are classified under appropriate secondaries within this ORCS or in ARCS.

-20	Employee recognition applicant/recipient files (arrange by program, then by year and sequential number)	SO+1y	nil	DE
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SO = when decision is rendered and publicity completed, 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.

PIB	-25	Employee recognition data (currently on ERS) (electronic records)	FY+1y	nil	DE
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(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57830	<u>TALENT MANAGEMENT - EMPLOYEE RECOGNITION</u> (continued)			
	-30 Employee recognition program development files (arrange by program)	SO	2y	DE
	SO = when developed, cancelled, or abandoned and when no longer required for reference purposes			
	2y = The two-year semi-active retention period provides sufficient time to ensure these records are no longer required.			
	DE = These files may be destroyed upon the approval of the Records Officer because the eligibility guidelines and selection criteria of established award and recognition programs are fully retained by the government archives under secondary -00.			
PIB	-40 Long service award registration system data (currently on LSARS) (electronic records)	SO	nil	DE
	SO = when the current year's data is captured on electronic spreadsheets and when the next year's registration period begins			

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A SA FD

57850 TALENT MANAGEMENT - EXECUTIVE RECRUITMENT

Records relating to the recruitment of senior leaders to and within the BC public service.

This involves competitions for positions, interviews with executive prospects, and appointments.

Record types include correspondence, forms, orders in council (OICs), reports, and other types of records as indicated under relevant secondaries.

For hiring related to the public service as a whole, see primary 57870.

For OIC appointments, see secondary 57240-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, BC Leadership Centre) 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>	<u>5y</u>	<u>FR</u>
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

PIB	-20	Executive appointment files (includes résumés, offer letters, OICs, and terms and conditions of employment, including salary arrangements) (arrange by employee)	SO	10y	FR
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SO = upon retirement, resignation, or employment termination from the BC public service

10y = The 10-year retention period provides sufficient time for review and consultation.

FR = The government archives will fully retain executive appointment files because they document the appointment, terms and conditions of employment, and the biographies and professional careers of
(continued on next page)

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FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57850 TALENT MANAGEMENT - EXECUTIVE RECRUITMENT
(continued)

senior leaders within the BC public service
(associate deputy ministers, deputy ministers and
equivalent positions).

PIB	-30	Executive hiring files (includes job advertisements, applications, résumés, interview questions and notes, and checklists) (arrange by applicant)	CY+1y	2y	DE
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PIB	-40	Executive prospect files (includes résumés and interview notes) (arrange by name of individual)	SO	2y	DE
-----	-----	---	----	----	----

SO = when no longer under consideration

NOTE: This secondary covers individuals of interest from
within and outside the BC public service.

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SA = Semi-active
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PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
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A SA FD

57870 TALENT MANAGEMENT - HIRING

Records relating to the development, implementation, and maintenance of strategies and programs concerning the hiring and deployment of the public service. This includes partnerships, campaigns, projects, and tools for across-government benefit.

Record types include correspondence, reports, guides, discussion and issue papers, and copies of briefing notes.

For committees, see ARCS secondary 200-20.

For contracts, see ARCS secondary 1070-20.

For executive recruitment, see primary 57850.

For minister's letters, see ARCS secondary 280-30.

For order in council appointments, see secondaries 57240-20 and 57850-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Hiring Strategy and Specialist Services) 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>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

-02	Direct appointments		CY+4y	5y	DE
-----	---------------------	--	-------	----	----

10y = The 10-year retention period provides sufficient time for review and consultation.

NOTE: This secondary covers requests from deputy ministers for the approval of direct appointments under the *Public Service Act* (s. 10[b]). Program staff review the requests and submit their recommendations to the deputy minister of the Public Service Agency for decision.

NOTE: When direct appointments are approved, letters of appointment are classified on the employee personnel files under secondary 57240-20.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57870	<u>TALENT MANAGEMENT - HIRING</u> (continued)			
-20	Hiring project and program files (arrange by project or program)	SO	5y	DE

SO = when project or program is completed, closed, or cancelled, and when no longer required for reference purposes

5y = The five-year semi-active retention period ensures these records are no longer required.

DE = These files may be destroyed upon the approval of the Records Officer because final documents will be fully retained by the government archives under secondary 57800-02.

NOTE: These files include strategies, projects, and programs on hiring methods and best practices, recruitment campaigns, marketing the public service as a brand, and electronic tools to assist managers and job applicants.

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FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
VR = Vital Records

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A SA FD

57880 TALENT MANAGEMENT - LEADERSHIP DEVELOPMENT

Records relating to the development and advancement of senior leaders from within the BC public service.

This involves the selection and development of employees who are ready or near-ready to assume more senior leadership roles (i.e., director, executive director, deputy ministry, or assistant deputy minister) and the coordination of resources and opportunities to foster their professional development and experience.

Record types include correspondence, forms, applications, résumés, reports, and discussion papers.

For committees, see ARCS secondary 200-20.
For contracts and requests for qualifications (RFQs) and proposals (RFPs), see ARCS secondary 1070-20.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, BC Leadership Centre) will retain these records for:

	CY+1y	nil	DE
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Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:

	<u>SO</u>	<u>nil</u>	<u>DE</u>
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-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Leadership development final products		SO	nil	FR

FR = The government archives will fully retain leadership development final products because they document tools and programs for defining and developing senior leaders within the BC public service.

One copy of each final product will be printed upon completion, and then boxed with other records designated for full retention.

NOTE: Products include a competency framework, leadership assessment inventory, and leadership education programs.

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PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records

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			<u>A</u>	<u>SA</u>	<u>FD</u>
57880	<u>TALENT MANAGEMENT - LEADERSHIP DEVELOPMENT</u> (continued)				
PIB	-03	Leadership participant psychometric assessments (electronic records)	SO	nil	DE
		SO = upon development of participant's learning plan			
		NOTE: This secondary covers tests completed by leadership participants that assess their competency, aptitude, decision-making and planning abilities, as well as their personalities and typical behavioural styles.			
PIB	-04	Leadership participation reports	CY+4y	nil	DE
		NOTE: These reports list the names of participating employees and track their development.			
PIB	-20	Leadership development applications (arrange by candidate)	SO	nil	DE
		SO = upon selection of participant			
		NOTE: These records are duplicates of records held by ministries under <i>ARCS</i> secondary 1705-02.			
PIB	-30	Leadership development participant files (arrange by participant)	SO	10y	DE
		SO = upon employment termination, or when reclassified under secondary -35 because participant chose to opt out of the program			
		10y = The 10-year retention period is consistent with the retention period for executive appointment files classified under secondary 57850-20.			
PIB	-35	Leadership development participants - opted out (arrange by participant)			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57880	<u>TALENT MANAGEMENT - LEADERSHIP DEVELOPMENT</u> (continued)			
-40	Leadership development 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 semi-active retention period ensures
these records are no longer required.

DE = These files may be destroyed upon the approval of the
Records Officer because final products will be fully
retained by the government archives under secondary
-02.

NOTE: Projects addressed in these files include:
leadership assessments, best practices,
competency framework, 360-degree feedback, and
education programs.

These files include research projects undertaken in
partnership with the BC Institute for Leadership and
Management Development, a consortium
comprising Camosun College, Royal Roads
University, and the University of Victoria.
Consortium meeting records are classified under
ARCS secondary 200-20.

A = Active
SA = Semi-active
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PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
FOI = Freedom of Information/Privacy
VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57900 WORKFORCE RESTRUCTURING

Records relating to workforce restructuring resulting from the elimination of positions or voluntary exit programs. This involves determining severance pay and retirement allowances for departing employees, handling job placements for employees affected by workforce restructuring or by an illness or injury, determining the employer's financial responsibility in pensionable service purchases, and reviewing and responding to pension concerns and proposed policy changes.

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

For excluded employee dispute resolution, see secondary 57540-20.

For the Workforce Adjustment System (WFAS) Information System Overview (ISO), see the ISO section.

Unless otherwise specified below, the ministry OPR (BC Public Service Agency, Workforce Restructuring Services) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Pension issue and policy review files (arrange by subject)		SO	nil	DE

SO = when issue resolved or upon completion of policy review, and when no longer required for reference purposes

NOTE: This secondary covers reviews of the impact of BC Pension Corporation policy changes, the resolution of resulting issues (e.g., managing contribution increases), as well as routine liaison and communication with the Pension Corporation.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57900 WORKFORCE RESTRUCTURING (continued)

PIB -20 Placement files SO+1y 6y DE
(includes correspondence, résumés, seniority lists,
vacancy lists, handwritten notes, and offer letters)
(arrange by employee surname)

OPR = Client Services

SO = when employee is placed in a vacant position and
upon conclusion of probation period and when no
further action is anticipated

7y = The seven-year retention period provides sufficient
time to ensure that the employee is properly and
permanently placed.

NOTE: Secondaries -20 and -25 are working files for
placements arising out of workforce restructuring.
Employees' surplus and placement letters are filed
on their personnel files under secondary 57240-20.

PIB -25 Placement files - disputes SO+1y 6y DE
(includes correspondence, résumés, seniority lists,
vacancy lists, handwritten notes, and offer letters)
(arrange by employee surname)

SO = when employee is placed in a vacant position and
when further action (e.g., probation, grievances,
arbitration, or legal action) is completed or no longer
anticipated

7y = The seven-year retention period provides sufficient
time to ensure that the employee is properly and
permanently placed.

NOTE: This secondary covers placements that are in
dispute and which may proceed through the
grievance process or the courts.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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			<u>A</u>	<u>SA</u>	<u>FD</u>
57900		<u>WORKFORCE RESTRUCTURING</u> (continued)			
PIB	-30	Placement files - rehabilitative employment (includes correspondence, résumés, Rehabilitation Committee applications, vacancy lists, handwritten notes, offer letters and other correspondence on employment restrictions, position suitability and training requirements) (arrange by employee surname)	SO+1y	6y	DE
		SO = when employee is placed and upon conclusion of the placement timeframe specified in the collective agreement			
		7y = The seven-year retention period provides sufficient time to ensure that the employee is properly and permanently placed.			
		NOTE: This secondary covers working files for the placement of employees who are unable to perform their regular duties because of illness or injury. Employees' placement letters are filed on their personnel files under secondary 57240-20.			
PIB	-40	Purchase of service files (arrange by employee surname)	SO+3y	2y	DE
		SO = when decision rendered			
		5y = The five-year retention period provides sufficient time to respond to inquiries about the rationale for the decision.			
		NOTE: These records document the research and rationale for decisions on whether or not the employer or employee pays the employer's portion of pensionable service purchases. Depending on the type of service purchased, the employee may be required to pay both the employer and employee contributions.			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
57900	<u>WORKFORCE RESTRUCTURING</u> (continued)			
	-50 Retirement allowance files (includes signed paid absence forms, Registered Retirement Savings Plan [RRSP] transfer forms, handwritten notes, pension statements, cheque requisitions and copies of cheques) (arrange by batch)	CY+1y	8y	DE
	10y = The 10-year retention period provides sufficient time to ensure that all participating employees will have reached the age of 65 and that their inquiries concerning their retirement allowances will have ended. It also satisfies the six-year retention period under the <i>Income Tax Act</i> (RSC 1985, c. I-5, s. 230[4]) for the T4As that are issued.			
	NOTE: Retirement allowances are amounts paid on retirement (from age 55 to 65) in recognition of long service. These records document the calculation of the allowances and the determination of eligible RRSP transfer amounts.			
PIB	-60 Severance files (includes termination letters, agreements, RRSP transfer forms, handwritten notes, notices of assessment, pension statements, signed release forms, cheque requisitions and copies of cheques) (arrange by employee surname)	SO	20y	DE
	SO = upon issue of last T4A or expiry of "mitigation" date, whichever is later			
	20y = The 20-year retention period provides sufficient time for consultation and reactivation of the files if the employee returns to the BC public service and negotiates another severance payment. It also satisfies the six-year limitation period for commencing an action with respect to a contract under the <i>Limitation Act</i> (RSBC 1996, c. 266, s.3) and the six-year retention period under the <i>Income Tax Act</i> (RSC 1985, c. I-5, s. 230[4]) for the T4As that are issued.			
	(continued on next page)			

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

57900 WORKFORCE RESTRUCTURING (continued)

NOTE: Severance amounts are paid in a lump sum or in installments on employment termination in recognition of loss of employment. "Mitigation" addresses the legal obligations of an employee, who has received a severance package to find alternative employment, and the consequences of finding such employment upon the employee's severance entitlement.

NOTE: These records document the calculation of severance pay and the determination of eligible RRSP transfer amounts.

PIB	-70	Workforce restructuring and severance data (currently on the WFAS)	SO	nil	DE
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SO = when no longer required for review and analysis

NOTE: Although the data on WFAS dates from 1988, detailed placement and severance information dates from the inception of WFAS in 2002.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW SECTION

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First Aid Assessment Tool	FAAT
Grievance Tracking System	GTS
Long Service Award Registration System	LSARS
Cority	COR
Workforce Adjustment Tracking System	WFAS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency

System Title

Corporate Human Resource Information and Payroll System (CHIPS)

Purpose

The purpose of CHIPS is to produce the BC Government's bi-weekly payroll, track the employment history and training of government employees, and provide position information.

Information Content

CHIPS contains employee attendance, pay, expenses, taxable benefits, employment history, training, and position information.

Inputs, Processes, and Outputs

Inputs

CHIPS inputs consist of employment, payroll, leave, taxable benefit, and training information entered from personnel, payroll, and benefit files; position information entered from position history files and generic job files; updates entered by employees to their own personal information; biweekly time and leave reporting data loaded from Time On Line (TOL); Chart of Accounts information loaded from the Corporate Accounting System (CAS); and wage garnishee and bankruptcy information entered by Ministry of Finance, Legal Encumbrances staff.

Processes

CHIPS maintains pay, employment history and training information on BC public employees, interfaces with TOL to produce the biweekly payroll, tracks positions, and allows employees to update their own personal information as well as view and print reports concerning their leave, benefits and pay.

CHIPS also interfaces with CAS, Workforce Adjustment Tracking System (WFAS), Disability Data Management Application (DDMA), the Integrated Pension Administration System (IPAS), Electronic Funds Transfer (EFT) system, Cheque Management System (CMS), and computer systems used by BC Mail Plus, Pacific Blue Cross, Medical Services Plan, Alberta Blue Cross, BC Government Employees' Union, Professional Employees' Association, BC Statistics, Statistics Canada, Bank of Canada, and Workers' Compensation Board.

Outputs

CHIPS outputs consist of reports and loads to external databases.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the ARCS manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

OPERATIONAL 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 ORCS has been implemented according to standards approved by Corporate Information Management Branch. For assistance in implementing ORCS, contact your Records Officer.

Classification

Electronic System

The electronic system is not classified in the ORCS. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Schedule No.	Secondary No.	Secondary Title
181080 (PSPM)	57360-02	CHIPS position information
181080 (PSPM)	57240-30	Employee work history data
181080 (PSPM)	57820-50	Employee training records
190091 (PAYR)	63580-40	Payroll data

Inputs

Schedule No.	Secondary No.	Secondary Title
100001 (ARCS)	1735-30	Training session attendance files
181080 (PSPM)	57360-40	Generic job files
181080 (PSPM)	57360-50	Position history files
181080 (PSPM)	57240-20	Employee personnel files
190091 (PAYR)	63520-20	Employee benefit files
190091 (PAYR)	63540-04	CHIPS web-based training
190091 (PAYR)	63560-04	Cheque stop payment/replacement files
190091 (PAYR)	63560-05	CHIPS reversal working files
190091 (PAYR)	63560-12	T4 amendment supporting files (1996 to present)
190091 (PAYR)	63580-02	Canada Payroll Saving Program forms
190091 (PAYR)	63580-03	Overtime, shift, standby (OSS) forms
190091 (PAYR)	63580-05	TOL Not Signed Off (NSO) reports
190091 (PAYR)	63580-20	Employee pay files
190091 (PAYR)	63580-30	Employee time and leave reporting data

Outputs

Schedule No.	Secondary No.	Secondary Title
181080 (PSPM)	57240-20	Employee personnel files
190091 (PAYR)	63500-02	Calendar year-end payroll review reports
190091 (PAYR)	63500-03	Fiscal year-end payroll review reports
190091 (PAYR)	63500-04	Pay run review reports
190091 (PAYR)	63520-07	PBC transfer lists
190091 (PAYR)	63540-02	CHIPS and TOL access security reports
190091 (PAYR)	63560-02	Biweekly payroll balancing reports
190091 (PAYR)	63560-05	CHIPS reversal working files
190091 (PAYR)	63560-07	Gross pay over \$25,000 review and confirmation
190091 (PAYR)	63560-10	Pension contribution/segment report reconciliation
190091 (PAYR)	63560-11	Salary overpayment accounts receivable (STOB 1290)
190091 (PAYR)	63560-30	Payroll deduction remittance/reconciliation files
190091 (PAYR)	63580-20	Employee pay files

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in *ARCS*.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.
- For CAS, see the *Office of the Comptroller General ORCS*
- For CMS, see the *Provincial Treasury ORCS*.
- For DDMA, see the Information System Overview (ISO) in this *ORCS*.
- For EFT, see the *Provincial Treasury ORCS*.
- For IPAS, see the records of the British Columbia Pension Corporation.
- For TOL, see the TOL ISO in the *Payroll Services ORCS*.
- For WFAS, see the ISO in this *ORCS*.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency
Workplace Health & Safety

System Title

Disability Data Management Application (DDMA)/Integrated Case Management System (ICM)

Purpose

The purpose of DDMA/ICM is to support the case management of employees who are on Short Term Illness and Injury Plan (STIIP) or equivalent (e.g., Weekly Indemnity [WIN]), Long Term Disability (LTD), or workers' compensation benefits. It is also used to assist staff in WorkSafeBC (formerly Workers' Compensation Board [WCB]) with claim cost analysis and monitoring work-related illness and injury rates.

DDMA was implemented in 2001. ICM was implemented in 2009. Both applications share the same data repository (database) but have different front-end applications, with different functionality and different views of the shared data.

Information Content

The database contains the names and benefit ID numbers of employees who are disabled as result of illness or injury and includes related STIIP, LTD, workers' compensation, Rehabilitation Committee and subrogation claim information.

Data formerly retained in the following FoxPro applications now forms part of the DDMA/ICM data repository: WCB Claim Cost System, MSP, Group Life and T4 Tracking System, and the Tombstone System. The data contained in these former applications includes the cost of workers' compensation claims; Medical Services Plan (MSP) premium and reconciliation payment data; and tombstone information for those employees to whom the BCPSA provides benefit services.

Prior to DDMA's inception, summary disability case management data was retained on index cards. Only active claim summary information was transcribed from the cards and data entered into DDMA.

Inputs, Processes, and Outputs

Inputs

The database inputs consist of information loaded from the Corporate Human Resource Information and Payroll System (CHIPS); LTD datafiles received from the LTD carrier; claims cost datafiles received from WorkSafeBC; MSP premiums data files received from MSP; and tombstone data files received from selected employers. Case management information is entered by program staff from the case files, Rehabilitation Committee meetings, WorkSafeBC claims appeals, Subrogation case tracking, as well as from consultations with WorkSafeBC staff and employees' supervisors.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Processes/Outputs

DDMA/ICM assists staff in monitoring the case management of employees on STIIP, LTD and workers' compensation benefits, as well as their WCB claims appeals and their return to work progress. The database also link Rehabilitation Committee minutes to relevant cases and generates agendas, minutes and reports.

In addition, ICM is used for the payment and reconciliation of applicable MSP and Group Life premiums for employees on LTD and is used to produce T4s relating to those payments.

Classification

Electronic System

This electronic system is not classified in the ORCS. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Secondary No.	Secondary Title
57420-20	Disability case and LTD claim management data
57420-27	Employee disability tombstone data
57420-40	MSP and group life payment and T4 data
57480-30	WCB claim cost data

Inputs

Secondary No.	Secondary Title
57240-30	Employee work history data
57420-30	LTD case management files
57420-35	Disability case management files
57480-20	WCB claim appeal files
57480-40	WCB claims program management files

Outputs

Secondary No.	Secondary Title
57440-20	LTD program management files
57440-30	STIIP program management files
57480-40	WCB claims program management files

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902.
- For computer system backup records, see ARCS secondary 6820-05.
- For administrative records relating to the system, see ARCS section 6 and other relevant primaries.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency
Compensation Research and Development Branch

System Title

Electronic Classification (E-Class) system

Purpose

The purpose of E-Class is to track the progress and status of classification cases and to provide a reference library of current job descriptions for program staff and approved ministry managers.

Information Content

E-Class contains job descriptions, organization charts, position classification history, the rationale for classification decisions, appeal information, and a diary of the progress of the classification request, including the names of assigned staff members.

Inputs, Processes, and Outputs

Inputs

E-Class inputs consist of information entered by staff from the position history files and hyperlinked job descriptions, organization charts, and word processing documents.

Processes

E-Class assists staff in monitoring the progress and status of classification requests; links job descriptions, organization charts, and word processing documents to classification cases; and produces performance reports.

Outputs

E-Class outputs consist of reports.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification

Electronic System

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Electronic Records

Secondary No.	Secondary Title
57360-20	Classification case management data

Inputs

Secondary No.	Secondary Title
57360-40	Generic job files
57360-50	Position history files
57360-60	Step one classification appeal files
57360-70	Steps two and three classification appeal files

Outputs

Secondary No.	Secondary Title
57360-03	Classification performance reports
57360-40	Generic job files
57360-50	Position history files

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in *ARCS*.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency
Talent Management Division

System Title

Employee Recognition System (ERS)

Purpose

The purpose of ERS is to record and report employee recognition activity related to staff appreciation awards, improvement awards, ministry-specific award programs, and informal award programs.

Information Content

ERS contains the names of recognition programs, names of recipients and approval authorities, reasons for recognition, recognition dates, and types of recognition (e.g., cash awards, gift certificates, flowers).

Inputs, Processes, and Outputs**Inputs**

ERS inputs consist of information entered by staff from oral or written requests from supervisors/managers.

Processes

ERS assists ministries and the BC Public Service Agency in recording and reporting employee recognition activity related to staff appreciation awards, improvement awards, ministry-specific awards, and information recognition programs. It also generates recognition approval forms for the signatures of approval authorities.

Outputs

ERS outputs consist of approval forms and reports.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification**Electronic System**

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Electronic Records

Schedule No.	Secondary No.	Secondary Title
181080 (PSPM)	57830-25	Employee recognition data

Inputs

Schedule No.	Secondary No.	Secondary Title
100001 (ARCS)	1310-50	Awards and recognition applicant/recipient files

Outputs

Schedule No.	Secondary No.	Secondary Title
100001 (ARCS)	1310-50	Awards and recognition applicant/recipient files
181080 (PSPM)	57830-02	Employee recognition activity reports
181080 (PSPM)	57830-20	Employee recognition applicant/recipient files

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in *ARCS*.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency (BCPSA)
Occupational Safety Programs

System Title

First Aid Assessment Tool (FAAT)

Purpose

The purpose of FAAT is to enable client worksites to complete their first aid needs assessments and to generate their first aid needs assessment notices and first aid procedures, and for BCPSA to monitor and report first aid assessment compliance.

Information Content

FAAT contains the names and locations of client worksites, names of individuals who completed the assessment forms, the number of workers at worksites, worksite proximity to medical facilities, and worksite hazard ratings and first aid requirements.

Inputs, Processes, and Outputs

Inputs

FAAT inputs are electronic first aid needs assessment forms completed by client worksites through the BCPSA web site.

Processes

FAAT manipulates the input data to produce first aid needs assessment reports and accompanying first aid procedures for each worksite and to create spreadsheets showing worksites that have completed their assessments.

Outputs

FAAT outputs consist of notices, procedures, spreadsheets, and reports.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification

Electronic System

The electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

OPERATIONAL 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 *ORCS* has been implemented according to standards approved by Corporate Information Management Branch. For assistance in implementing *ORCS*, contact your Records Officer.

Electronic Records

Schedule No.	Secondary No.	Secondary Title
181080 (PSPM)	57650-03	First aid needs assessment information

Inputs

Schedule No.	Secondary No.	Secondary Title
100001 (ARCS)	1560-03	First aid needs assessments

Outputs

Schedule No.	Secondary No.	Secondary Title
100001 (ARCS)	1560-03	First aid needs assessments
181080 (PSPM)	57650-03	First aid needs assessment information
181080 (PSPM)	57650-04	First aid needs assessment notification reports

Other Related Records

- For transitory electronic data processing (EDP) records, see schedule number 102902 in the *ARCS* manual.
- For computer system backup records, see schedule 112910 in the *ARCS* manual.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency
Labour Relations Branch

System Title

Grievance Tracking System (GTS)

Purpose

The purpose of GTS to track the progress and status of grievances filed for arbitration.

Information Content

GTS contains names of employees, nature of disputes and related collective agreement article numbers, and the progress of the grievance through the arbitration process, including the names of assigned staff members.

Inputs, Processes, and Outputs**Inputs**

GTS inputs consist of information entered by staff from the grievance arbitration files.

Processes

GTS assists staff in monitoring the progress and status of grievances filed for arbitration and analyzing trends.

Outputs

GTS outputs consist of reports.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification**Electronic System**

The electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Secondary No.
57540-45

Secondary Title
Grievance arbitration tracking

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Inputs

Secondary No.
57540-40

Secondary Title
Grievance arbitration files

Outputs

Secondary No.
57540-04

Secondary Title
Grievance arbitration tracking reports

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in *ARCS*.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency
Learning Services Branch

System Title

Long Service Award Registration System (LSARS)

Purpose

The purpose of LSARS is to register employees eligible for long service awards.

Information Content

LSARS contains the names and employee numbers of eligible employees, years of service, contact information, ministry or organization of employment, and supervisors' names and contact information.

Inputs, Processes, and Outputs

Inputs

LSARS inputs consist of online and paper registration forms.

Processes

LSARS records the names of eligible employees for long service awards.

Outputs

LSARS outputs consist of reports and electronic spreadsheets.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the *ARCS* manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification

Electronic System

The electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Schedule No.	Secondary No.	Secondary Title
181080 (PSPM)	57830-40	Long service award registration system data

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Inputs

Schedule No.	Secondary No.	Secondary Title
100001 (ARCS)	1310-50	Awards and recognition applicant/recipient files

Outputs

Schedule No.	Secondary No.	Secondary Title
181080 (PSPM)	57830-02	Employee recognition activity reports
181080 (PSPM)	57830-04	Long service award recipient spreadsheets

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in *ARCS*.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

Cority

SYSTEM OVERVIEW

Creating Agency

British Columbia Public Service Agency
Workplace Health and Safety
Occupational Health & Rehabilitation

Date of System Description

2023-02-13

Purpose

Cority is a cloud-based environmental health and safety (EHS) management software that provides a central repository for employee medical histories and internal workflows. The purpose of Cority is to support the medical case management of BC Government employees.

Information Content

Cority contains employee names, numbers, contact information, case management records, medical diagnostic and treatment information, examination information, influenza and Hepatitis B vaccination information, pre-placement physical competency test results, safety incident reporting records, and WorkSafe BC (WSBC) claim information.

Inputs, Processes, and Outputs

Inputs:

Cority inputs consist of information loaded from the Corporate Human Resource Information and Payroll System (CHIPS), scanned documents, and confidential medical and case information entered by staff from employees' health files.

Processes:

Cority assists staff in managing the medical and case management of employees, and safety incident records.

Outputs:

Cority outputs consist of standard and ad hoc reports.

Historical Note

Cority replaced Occupational Health Manager (OHM) and Disability Data Management Application (DDMA) in January 2020 but retains the same functional aspects of both. DDMA featured case records and OHM featured clinical records, and were merged and fully migrated into Cority except for duplicated records.

Cority

DATA RETENTION PLAN

Data Description	Data Retention Period
57600-02 Hepatitis B vaccination forms (no health file)	Destroy ten years after resignation, employment termination, or retirement from the BC public service, or death while in service.
57600-20 Employee health files (no exposure)	Destroy 16 years after resignation, employment termination, or retirement from the BC public service, or death while in service.
57600-25 Latent biological hazard exposure files	Destroy 30 years after resignation, employment termination, or retirement from the BC public service, or death while in service.

For additional classification details, including retention rationales, click on the links above.
For descriptions of system related records (e.g. back-up data, log files, and transitory systems information), see the Systems Section [FAQ](#).

END OF OVERVIEW

OPERATIONAL 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 ORCS has been implemented according to standards approved by Corporate Information Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

British Columbia Public Service Agency
Workforce Restructuring Services

System Title

Workforce Adjustment Tracking System (WFAS)

Purpose

The purpose of WFAS is to monitor, analyze and report on employees impacted by workforce adjustment, as well to monitor employees receiving severance payments.

Information Content

WFAS contains employees' names, social insurance numbers, birth dates, identification numbers, work and home addresses and telephone numbers, proposed retirement dates, base classifications, position numbers, employment start and end dates, estimated sick bank values, base salaries, leavebank information, severance amounts, disbursement amounts, Registered Retirement Savings Plan account numbers, and job placement information.

Inputs, Processes, and Outputs

Inputs

WFAS inputs consist of information loaded from the Corporate Human Resource Information and Payroll System (CHIPS) and information entered by staff on employees impacted by workforce adjustment and/or receiving severance payments.

Processes

WFAS assists staff in monitoring employees affected by workforce restructuring, as well as employees that received severance payments.

Outputs

WFAS outputs consist of reports and severance cheque requisitions.

Technical Maintenance

Electronic records are maintained on the system until their retention schedule is completed. (This usually parallels the schedule for related paper records.) The electronic records are then purged from the system. Any exceptions to this purge routine are noted under specific secondaries.

The electronic system is routinely backed up in accordance with ministry policy and with special schedule 112910 in the ARCS manual.

For retention and disposition schedules, see relevant primaries, which are listed in the classification section below.

Classification

Electronic System

The electronic system is not classified in the ORCS. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

OPERATIONAL 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 *ORCS* has been implemented according to standards approved by Corporate Information Management Branch. For assistance in implementing *ORCS*, contact your Records Officer.

Electronic Records

Secondary No.
57900-70

Secondary Title
Workforce restructuring and severance data

Inputs

Secondary No.
57240-20
57900-20
57900-25
57900-60

Secondary Title
Employee personnel files
Placement files
Placement files - disputes
Severance files

Outputs

Secondary No.
57900-60

Secondary Title
Severance files

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in *ARCS*.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.
- For CHIPS, see the CHIPS Information System Overview.

System Scheduling and Disposition

The system will be destroyed when all data has been migrated to a new system performing the same function, or when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

OPERATIONAL 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 *ORCS* has been implemented according to government policy and procedures. For assistance, contact your Records Officer.

APPENDICES

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APPENDIX A: Summary of Changes to the *Public Service Personnel management ORCS* (concordance table)

Primary/ Secondary	Title	Type of Change	New retention period A/SA/FD	Approval date
57420	EMPLOYEE BENEFITS – DISABILITY CASE MANAGEMENT	Updates to scope note and cross-references. OPR updated.		2012/05/31
57420-02	Claims Review Committee decisions	Secondary note updated to reflect new title for secondary -30 LTD case management files.	N/A	2012/05/31
57420-04	LTD claims summary cards	New	SO/nil/DE	2012/05/31
57420-20	Disability case management data	Title changed to Disability case and LTD claim management data. Qualifier updated to reflect that data is now stored on the DDMA/ICM System. SO statement changed from “when case is closed (i.e., employee re- qualifies for STIIP or LTD benefits by clearing the successive disabilities timeframe specified in the <i>Long Term Disability Plan Regulation</i> [BC Reg. 409/97, s. 2.7]) and outstanding issues [e.g. return to work, grievance, or arbitration] are concluded” to “upon retirement, resignation, or employment termination from the BC public service.” 20 year justification statement updated. Data range statement removed from secondary note. New secondary note added.	SO+20y/nil/DE <i>SO definition changed</i>	2012/05/31

A = Active
SA = Semi-active
FD = Final Disposition
FOI = Freedom of Information/Privacy
PIB = Personal Information Bank
OPR = Office of Primary Responsibility

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
y = year
VR = Vital Records

SO = Superseded or Obsolete
DE = Destruction
SR = Selective Retention
FR = Full Retention
OD = Other Disposition

APPENDIX A: Summary of Changes to the *Public Service Personnel management ORCS* (concordance table)

Primary/ Secondary	Title	Type of Change	New retention period A/SA/FD	Approval date
57420-27	Employee disability tombstone data	New	SO+20y/nil/DE	2012/05/31
57420-30	Headquarters disability case management files	Title changed to LTD case management files. Includes qualifier added. Secondary notes updated.	N/A	2012/05/31
57420-35	Regional disability case management files	Title changed to Disability case management files. Includes qualifier added. Semi-active retention period and final disposition changed from NA/NA to 20y/DE to reflect current business processes and retention requirements. Secondary note added to reflect current business practices.	SO/20y/DE <i>Increased</i>	2012/05/31
57420-35	Regional disability case management files	Ongoing accession number 90-7938 added.	N/A	2012/10/24
57420-40	MSP and group life payment tracking and T4 data	New	FY+7y/nil/DE	2012/05/31
57420-45	Subrogation files	New secondary created when LTD case management files were split in two for filing purposes in TRIM. All SO and retention information remains the same as in -30.	SO/20y/DE	
57480	EMPLOYEE BENEFITS – WCB CLAIM APPEALS	Removal of cross-reference to the obsolete FoxPro Claim Cost System. Data from the system was migrated to the DDMA/ICM System.		2012/05/31

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APPENDIX A: Summary of Changes to the *Public Service Personnel management ORCS* (concordance table)

Primary/ Secondary	Title	Type of Change	New retention period A/SA/FD	Approval date
57480-30	WCB claim cost data	Qualifier updated to indicate that data is now stored on the DDMA/ICM System. SO statement changed from “upon conclusion of all appeals and appeal periods” to “after last claim cost received or upon conclusion of all appeals and appeal periods.” 20 year justification statement altered slightly.	SO+20y/nil/DE <i>SO definition and 20 year justification statement changed</i>	2012/05/31
57600-02	Hepatitis B vaccination forms (no health file)	Replaced retention definition reference from the College of Physicians and Surgeons of BC in <i>Rules Made Under the Medical Practitioners Act</i> (RSBC 1996, c. 285) to WorkSafeBC’s <i>Occupational Health & Safety Guidelines: G6.34-5</i> Record keeping requirements.	N/A	2023/10/24
57600-03	Influenza vaccination forms (no health file)	Replaced retention definition reference from the College of Physicians and Surgeons of BC in <i>Rules Made Under the Medical Practitioners Act</i> (RSBC 1996, c. 285) to the WorkSafeBC’s <i>Occupational Health & Safety Guidelines: G6.34-5</i> Record keeping requirements.	Retention increased from CY/7y/DE to CY/10y/DE	2023/10/24
57600-04	Pre-placement examinations (candidates not hired)	Title changed from “Pre-employment examinations (candidate not hired)” The College of Physicians and Surgeons of BC in the Health Professionals Act (RSBC 1996, c.183) increased the retention of medical practice records from 10 years to 16 years.	Retention increased from CY/10y/DE to CY/16y/DE	2023/10/24

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APPENDIX A: Summary of Changes to the *Public Service Personnel management ORCS* (concordance table)

Primary/ Secondary	Title	Type of Change	New retention period A/SA/FD	Approval date
57600-05	Sick leave paper forms (since April 2005)	Replaced – reclassify to 57600-07	Retention changed from SO/2y/DE to SO/nil/DE SO definition changed from “when scanned to OHM and digitized images have been verified for quality and backup has taken place” to “when no longer required for reference or quality control purposes and have been uploaded to the occupational health database”	2023/10/24

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APPENDIX A: Summary of Changes to the *Public Service Personnel management ORCS* (concordance table)

Primary/ Secondary	Title	Type of Change	New retention period A/SA/FD	Approval date
57600-06	Sick leave forms – digitized images	Replaced – reclassify to 57600-07	Retention changed from SO/10y/DE to SO/nil/DE SO definition changed from “upon resignation, employment termination, or retirement from the BC public service, or death while in service” to “when no longer required for reference or quality control purposes and have been uploaded to the occupational health database”	2023/10/24
57600-07	Sick leave forms	New Replaces 57600-05 and 57600-06	SO/nil/DE	2023/10/24
57600-20	Employee health files (no exposure)	The College of Physicians and Surgeons of BC in the Health Professionals Act (RSBC 1996, c.183) increased the retention of medical practice records from 10 years to 16 years.	Retention increased from SO/10y/DE to SO/16y/DE	2023/10/24

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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APPENDIX B: ONGOING ACCESSION NUMBERS

See the RIM Glossary for definitions of accession, accession number, and ongoing accession number (OAN):

http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/rim_manual/glossary.html#Accession.

Note that each OAN is assigned to only one office. The office authorized to use the OAN must keep track of the last number used in each set of boxes sent offsite, so that the next set of boxes sent can start with the next available number (e.g., boxes 1-25 sent offsite September 2009, boxes 26-31 sent December 2009, and so on).

Your Records Officer has assigned ongoing accession numbers covering records classified under this ORCS to the following categories of records:

OAN	Primary and Secondary No.	Primary and/or Secondary Title
90-7938	57420-35	Disability case management files
91-3855	57420-30	LTD case management files
91-3869	57360-70	Steps two and three classification appeal files
91-4112	57480-20	WCB claim appeal files

For further information about ongoing accession numbers, contact your Records Officer.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

PUBLIC SERVICE PERSONNEL MANAGEMENT

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

INDEX

This index provides an alphabetical guide to ORCS subject headings and relevant primary number(s). It should enable the user to locate the primary number(s) in which documents relating to a specific subject or function may be classified. It should also aid the user in retrieving, by subject, documents which have been classified and filed.

Employees responsible for records classification should use this index as a means of access to the contents of ORCS. Once they have located what appear to be relevant index entries for a given subject, they should refer to the primary or primaries listed in order to determine which is the correct classification and also to determine the correct secondary. Often, the primary scope notes will clarify whether or not a document should be classified in a given primary. Primary scope notes should be read carefully as they delineate a primary's subject and content.

This index contains an alphabetical listing of:

- a) all keywords which appear in primary titles;
- b) all keywords which appear in secondary titles;
- c) keywords which appear in primary scope notes;
- d) common synonyms for indexed keywords; and
- e) common abbreviations.

Cross-references:

"See" references indicate that the subject heading sought is indexed under an alternate entry (a more appropriate keyword, a full or official name, etc.).

"See also" references are used when additional information can be found in another entry.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

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- temporary/auxiliary employees	57200

EMPLOYEE(S)

- and Family Assistance Program	57460
- charitable donations	57100
- complaints	57540
- counseling	57460
- disputes	57540
- disability tombstone data	57420
- executive recruitment	57850
- excluded, dispute resolution	57540
- excluded, terms and conditions	57300
- exclusion of positions	57520
- grievances	57540
- learning	57820
- learning projects	57800
- medical files	57600
- performance management	57800
- placements	57900
- pools, auxiliary/temporary	57200
- leadership	57880
- personnel files	57240
- recognition	57830
- Recognition System	ISO Section
- training records	57820
- work history	57240

EMPLOYER

- benefit plan files	57400
- complaints against	57540

EMPLOYMENT

- standards complaints	57540
- terms and conditions, bargaining unit employees	57520
- terms and conditions, excluded employees	57300

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

ENDURANCE	
- tests	57600
ENGAGEMENT	57800
ESSENTIAL SERVICE	
- planning	57500
EVALUATION PLANS	
- job	57320
EXAMINATIONS	
- medical	57600
EXCLUDED EMPLOYEES	
- agreements	57360
- dispute resolution	57540
- negotiations	57520
- terms and conditions	57300
EXECUTIVE	
- appointments/hiring	57850
- leadership development	57880
EXIT PROGRAMS	57900
EXPANSION OF SERVICES	
- account management	57220
- client services	57200
EXPEDITED	
- arbitrations	57540
EXPOSURE FILES	
- biological hazard	57600
EYESIGHT	
- tests	57600
- F -	
FAMILY	
- Assistance Program	57460
FEES	
- reimbursement, educational	57820
FIRST AID	
- needs assessments	57650

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

FLU (See INFLUENZA)

- G -

GAMING

- licence

57100

GENERIC

- job files

57360

GRIEVANCE(S)

- Tracking System

57540
ISO Section

GROUP LIFE

- payment tracking data related to employees on LTD

57420

GUIDELINES

- practice

57000

- H -

HARASSMENT

-complaints

57540

HEALTH

- files, occupational

57600

- related absence files

57240

HEARING

- tests

57600

HEPATITIS B

- vaccinations

57600

HIRING

- executives

57870

57850

HOURS OF WORK

- disputes

57540

HR (See HUMAN RESOURCES)

HUMAN CAPITAL (See TALENT MANAGEMENT)

HUMAN RESOURCE(S)

- account management

57220

- client services

57200-57240

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

- employee files 57240
- policy manual 57050
- practice guidelines 57000
- procedures 57000
- Toolkit 57000

HUMAN RIGHTS

- complaints 57540
- in workplace 57800

- I -

INFLUENZA

- vaccinations 57600

INTERPRETATIONS

- collective agreement 57520

- J -

JOB

- benchmarks 57320
- classification 57360
- evaluation plans 57320
- files, generic 57360
- postings 57200

- K -

- L -

LABOUR RELATIONS

- bargaining 57520
- client files 57500
- complaints 57540
- Practitioner's Worksite 57500
- project files 57500

LATENT

- biological hazard files 57600

LEADERSHIP

- development 57880

LEARNING

- needs assessments 57820
- plans 57820
- projects 57800
- strategies 57800

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

LICENCE
- gaming 57100

LOANS
- Employee and Family Assistance Program 57460

LONG SERVICE AWARD(S) 57830
- Registration System ISO Section

LONG TERM DISABILITY
- carrier correspondence 57440
- carrier reports 57440
- case management 57420
- claims summary cards 57420
- disability case management 57420
- program management 57440

LTD (See LONG TERM DISABILITY)

- M -

MANAGEMENT, SENIOR
- classification 57300
- compensation 57300

MANUAL DEXTERITY
- tests 57600

MARKETING
- account management 57220
- client services 57200

MEDICAL FILES 57600

MEDICAL SERVICES PLAN
- payment tracking data relating to employees on LTD 57420

- N -

NEEDS ASSESSMENT
- learning 57820

- O -

OCCUPATIONAL
- health 57600
- Health Manager ISO Section
- safety 57650

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

OVER-JOB-RATE

- requests

57300

- P -

PACKAGES

- training

57820

PARTICIPATION

- Provincial Employee Community Services Fund

57100

PAY RATES (See COMPENSATION)

PECSF (See PROVINCIAL EMPLOYEE COMMUNITY SERVICES FUND)

PENSION

- policy issues

57900

PERFORMANCE

- management

57800

PERSONNEL (See HUMAN RESOURCES)

PHYSICAL EXAMINATIONS

- pre-employment

57600

PLACEMENTS

57900

PLAN(NING)(S)

- curriculum

57820

- learning

57820

PLEDGE FORMS

- Provincial Employee Community Services Fund

57100

POLICE

- record checks

57240

POLICY

- development

57050

- manual

57050

- practice guidelines

57000

POOLS

- executive recruitment

57850

- leadership

57880

- temporary/auxiliary employees

57200

POSITION

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

- classification	57360
- data, CHIPS	57360
- data, E-CLASS	57360
- exclusion agreements	57360 and 57520
- history files	57360
- placements	57900
POSTINGS, JOB	57200
PRACTICE	
- communities of	57820
- guidelines	57000
PRACTITIONERS	
- Worksite	57500
PRE-EMPLOYMENT	
- physical examinations	57600
PREMIER'S	
- Innovation and Excellence Awards	57830
PROFESSIONAL DEVELOPMENT	57820
PROGRAM MANAGEMENT	
- Employee and Family Assistance	57460
- employee recognition	57830
- hiring	57870
- long term disability	57440
- STIIP	57440
- workers' compensation claims	57480
PROJECT FILES	
- engagement	57800
- hiring	57870
- labour relations	57500
- leadership	57880
- learning	57800
- performance management	57800
- workforce planning	57800
PROVINCIAL	
- Employee Community Services Fund	57100
PSYCHOMETRIC ASSESSMENTS	
- leadership candidates	57880
PURCHASE	
- of service	57900

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

- Q -

- R -

RADIATION

- exposure files

57600

RATES

- salary

57300

RECOGNITION

- employee

57830

RECONCILIATION

- charitable donation

57100

RECORD CHECKS

- criminal
- police

57240

57240

REGIONAL FILES

- compensation and classification specialists
- disability case management
- human resource consultants
- labour relations specialists
- occupational safety advisors
- placements

57360

57420

57200

57500

57650

57900

REHABILITATIVE

- placements

57900

REIMBURSEMENT

- educational fees

57820

REPORTS

- account management
- classification performance
- employee recognition
- first aid needs assessment
- grievance tracking
- leadership participation
- long term disability
- Provincial Employee Community Services Fund

57220

57360

57830

57650

57540

57880

57440

57100

RESTRUCTURING

- workforce

57900

RETIREMENT

- allowance

57900

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

- S -

SAFETY	
- occupational	57650
SALARY	
(See also COMPENSATION)	
- market adjustments	57300
- schedules	57300
- surveys	57300
SENIOR MANAGEMENT	
- classification	57300
- compensation	57300
- hiring	57850
- leadership development	57880
SERVICE	
- expansion	57200 and 57220
- level agreements	57220
- purchase of	57900
SEVERANCE	57900
SEXUAL HARASSMENT	
- complaints	57540
SHORT TERM ILLNESS AND INJURY PLAN (See STIIP)	
SICK LEAVE	
- absence files	57240
- disability case management files	57420
- medical files	57600
STAFFING	
- hiring and deployment	57870
- planning	57800
STIIP	
- disability case management	57420
- health-related absence files	57240
- program management	57440
STRATEGIES	
- learning	57800
STRENGTH	
- tests	57600
STRIKE PLANNING	57500

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

SUBROGRATION	57420
SUCCESSION PLANNING	57800
- executive recruitment	57850
- hiring	57870
- leadership development	57880
SURVEYS	
- salary	57300
SYSTEMS	
- CHIPS	ISO Section
- DDMA/ICM	ISO Section
- E-Class	ISO Section
- Employee Recognition	ISO Section
- Grievance Tracking	ISO Section
- Long Service Award Registration	ISO Section
- Occupational Health Manager	ISO Section

- T -

T4	
- data relating to employees on LTD	57420
TALENT MANAGEMENT	57800-57880
TEMPORARY	
- employees eligibility pools	57200
- market salary adjustments	57300
TERMS OF EMPLOYMENT	
- bargaining unit employees	57520
- excluded employees	57300
TOOLKIT	
- employee recognition	57830
- practice guidelines	57000
TRAINING	57820
TRANSFER	
- agreements	57520

- U -

UNIONS	
- complaints against	57540

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

- V -

VACCINATIONS	57600
VISION	
- tests	57600
VOLUNTARY	
- exit programs	57900

- W -

WCB (See WORKERS' COMPENSATION)	
WEB SITES	
- compensation	57300
- employee recognition	57830
- LR Practitioner's Worksite	57500
- public service personnel management	57000
WEEKLY INDEMNITY	
- disability case management	57420
- program management	57440
WIN (See WEEKLY INDEMNITY)	
WORK HISTORY	
- employee	57240
WORKERS' COMPENSATION	
- claim appeals	57480
- claim cost data	57480
- claims program management	57480
- disability case management	57420
WORKFORCE	
- Adjustment System	ISO Section
- planning	57800
- restructuring	57900

- X -

- Y -

- Z -