

**ACCOMMODATION AND REAL
ESTATE SERVICES
OPERATIONAL
RECORDS
CLASSIFICATION
SYSTEM**



**Province of
British Columbia**

**Information Access
Operations**

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Date: June 23, 2011

British Columbia. Records Management Operations

Accommodation and Real Estate Services operational records classification system

ORCS REGISTER OF AMENDMENTS

This register lists all approved changes made to the *Accommodation and Real Estate Services ORCS*, in ascending order (i.e., the most recent changes appear first).

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.

Original schedule approval date: 2011/05/19

Amendment Number	Amendment Type	Date Approved	Section/ Primary/ Secondary	Changes
170446	Administrative	2019-10-15	Section 1/ Primaries 73000 and 79400	Removal of references to the Integrated Service Solutions (ISS) Division and "Pre-2009" qualifiers. ISS and "Pre-2009" records and functions are dissolved and now the responsibility of the Real Property Division.

RECORDS RETENTION AND DISPOSITION AUTHORITY

This is a recommendation to authorize an operational records classification and scheduling system.	
Title Accommodation and Real Estate Services	
Ministry of Labour and Citizens' Services Accommodation and Real Estate Services	
<p>Description and Purpose:</p> <p>The <i>Accommodation and Real Estate Services Operational Records Classification System</i> covers all operational records created, received, and maintained by the Accommodation and Real Estate Services division and by its predecessor the British Columbia Buildings Corporation and previous government bodies that performed similar functions.</p> <p>They document the management of owned and leased properties entrusted to ARES, including the provision of real estate, leasing, planning, project, and property management services, and related pricing and client charges..</p> <p>For more information, see attached schedule.</p>	
Date range: 1871 ongoing	Physical format of records: see attached schedule
Annual accumulation: .30 cubic meters	
Recommended retention and disposition: scheduled in accord with attached ORCS.	

<p>THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:</p> <p><u><i>Hein Turner</i></u> <u>Feb 18, 2009</u> Records Officer Date</p> <p><u><i>Ray Roman</i></u> <u>Feb 18, 2009</u> Executive Director/ADM Date</p> <p><u><i>Manmohan</i></u> <u>Feb 27/09</u> Deputy Minister/Corporate Executive Date</p> <p>THE PUBLIC DOCUMENTS COMMITTEE CONCURS:</p> <p><u><i>S. Mitchell</i></u> <u>4 JUN 2009</u> Chair, PDC Date</p>	<p>THE SELECT STANDING COMMITTEE ON PUBLIC ACCOUNTS APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE:</p> <p style="text-align: right;"><u>J.T.</u> <u>June 9, 2010</u> Date</p> <p>APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY:</p> <p style="text-align: right;"><u>J.T.</u> <u>May 19, 2011</u> Date</p>								
<p>OTHER STATUTORY APPROVALS:</p> <table style="width:100%; border: none;"> <tr> <td style="width:25%; border: none;">_____ Signature</td> <td style="width:25%; border: none;">_____ Date</td> <td style="width:25%; border: none;">_____ Signature</td> <td style="width:25%; border: none;">_____ Date</td> </tr> <tr> <td style="border: none;">Title:</td> <td style="border: none;"></td> <td style="border: none;">Title:</td> <td style="border: none;"></td> </tr> </table>		_____ Signature	_____ Date	_____ Signature	_____ Date	Title:		Title:	
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Title:		Title:							

CONTACT: Mahia Frost, Records Analyst (250) 356-9440

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 Agency Accommodation Act* (SBC 2006, c. 7) 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

2008-10-23
Date

ARCHIVAL APPRAISAL:

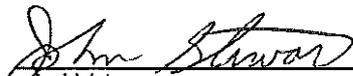
This appraisal documents the recommendation for final disposition.

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."

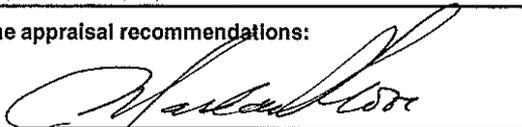
Record series or groups of records which will be retained in part are indicated by "Selective Retention." Selective retention means that portions of the record series will be retained by means of recognized archival selection criteria. For the meaning of selective retention with respect to a specific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

2008-10-23
Date

The undersigned endorses the appraisal recommendations:


Director, Corporate Information Management Branch

2008-10-23
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.

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HOW TO USE ORCS

For further information, contact your Records Officer.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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PART 1

THE OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

1.1 General Introduction

The purpose of this chapter of the *ORCS Manual* is to explain the nature, purpose, and usage of the *ORCS*. This chapter is a training tool which should be read by anybody attempting to classify, file, retrieve, or dispose of records covered by the *ORCS*. It is also a reference tool which can help users understand how to implement the *ORCS* and interpret specific parts of it.

This chapter is organized into three parts. Part One gives an overview of *ORCS* in general and an introduction to this *ORCS* in particular. Part Two explains how to read a primary, the basic building block of the *ORCS*. Part Three gives detailed background information on the records management system used by the BC Government, and procedures for using the *ORCS* as part of this system.

1.2 What is an ORCS?

ORCS is a combined records classification and scheduling system that facilitates the efficient and systematic organization, retrieval, storage, and destruction or permanent retention of the government's operational records.

A standard classification system such as *ORCS* is the cornerstone of an effective records management program. Each *ORCS* is tailored to fit the specific operational records relating to a function or program of government.

ORCS is also a records scheduling system. A records schedule is a timetable that governs the life span of a record from creation, through active use within an office and retention in off-site storage, to destruction or transfer to the government archives.

The records schedules incorporated into *ORCS* ensure that all operational records are retained for sufficient periods of time to meet the legal, operational, audit, fiscal or other requirements of government. A records schedule identifies those records that have enduring values and provides for their transfer to the government archives. Records schedules also provide for the timely destruction of routine operational records when they are no longer required to support the government's operational functions.

An integral part of the *ORCS* is the Information System Overview (ISO) Section, which ensures that electronic records are properly identified and scheduled. For further explanation of the ISO, see 3.11.

What are Operational Records?

Operational records relate to the operations and services provided by a ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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policy. Operational records are distinct from administrative records and are unique to each government organization.

Operational records are created in a variety of media, including: textual records, photographs, sound recordings, motion picture films, video recordings, audio-visual materials, paintings, prints, maps, plans, blueprints, architectural drawings, and other sound, film, video, photographic, and cartographic materials. Records exist in a number of different physical formats, such as paper, microfilm, and electronic records.

Records documenting administrative functions that are common to all government offices are classified in the government-wide *Administrative Records Classification System* (ARCS). Administrative records document and support functions such as the management of finances, personnel, facilities, property, or information systems. They also document common management processes, including committees, agreements, contract management, public information services, information and privacy, records management, postal services, legal opinions and other similar functions. Although these records are considered administrative, they may have considerable operational importance. For example, a committee may make decisions which affect ministry or agency policy. The ARCS manual is available in hardcopy from your Records Officer, or online at <http://www.lcs.gov.bc.ca/cimb/arcs/admin/main.asp>.

Some categories of records or data have special retention and disposition requirements and are handled by special records schedules. These schedules are standardized for all ministries and agencies, and cover both administrative and operational records. They can be used effectively to dispose of records not covered by ARCS and ORCS.

The following categories of special records schedules are provided in the ARCS manual:

Schedule No.	Schedule Title
112907	Commission of Inquiry Records
112910	Computer System Electronic Backup Records
102903	Electronic Mail
102906	Executive Records
102908	Record Copies of Published Maps
102905	Special Media Records (photographs, motion pictures etc.)
102902	Transitory Electronic Records
102901	Transitory Records
112913	Unsolicited Records
112914	Voice Mail Records
102904	Word Processing Records
112916	Year 2000 (Y2K) Project Documentation and Test Data Records

See the special schedules section of the ARCS manual for a description of these records and the records retention and disposition schedules covering them. For further guidance on applying these schedules, contact your Records Officer.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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The Purpose of ORCS

ORCS facilitates the efficient management of operational information by:

- providing a tool for executive control of recorded information;
- ensuring that needed information can be accessed quickly and accurately;
- ensuring that records are available to protect the fiscal, legal, operational, audit and other liabilities of government for required periods of time;
- providing for the timely destruction of routine operational records that are no longer required and ensuring that records of enduring value are retained by the government archives;
- providing a framework for the audit and review of operational functions;
- providing a legal basis on which the integrity, authenticity, and completeness of operational records may be established; and
- ensuring that electronic records are appropriately documented and scheduled, in relevant primaries and/or in the Information System Overview (ISO).

Responsibility for ORCS

The Corporate Information Management Branch (CIMB) is responsible for establishing standards for the development of ORCS for the operational records of public bodies covered by the *Document Disposal Act* (RSBC 1996, c.99).

Each ministry, government agency, and Crown corporation has a designated person responsible for implementing and coordinating records management procedures. This records officer, usually known as the Ministry Records Officer or Corporate Records Officer, should be contacted for further information whenever necessary. If you cannot determine who your records officer is, call CIMB at 250-387-1321.

The Royal British Columbia Museum (BC Archives) is responsible for preserving and providing access to records of enduring value to the province. The BC Archives takes care of records that are no longer needed by their creating agencies and have been appraised by an archivist for full or selective retention. In scheduling terms, these records have become inactive and have final disposition designations of full or selective retention. Records in BC Archives custody can be accessed through the BC Archives Reference Room, located at 655 Belleville Street, Victoria, or through the BC Archives website at <http://www.bcarchives.gov.bc.ca>. Access is subject to provisions of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165).

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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As well as the sections consisting of primaries and the ISO section, the ORCS has several other parts:

- Executive Summary (provides a high-level overview of the ORCS)
- Table of Contents
- How to Use ORCS (this section)
- Index (aids in classifying and finding records - see 3.6 for further discussion)

This ORCS was reviewed by CIMB staff, your executive, the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this ORCS as the retention and disposition schedule for the operational records of Accommodation and Real Estate Services. This means that this ORCS is a legally binding document, i.e., it has statutory authority.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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PART 2 HOW TO READ A PRIMARY

Although the structure of this *Operational Records Classification System* has been described earlier in this section, you will need to know more about its basic building block, the primary, in order to apply the ORCS schedule effectively.

The following is a sample primary in which each element is annotated with a number. The pages following the sample primary explain the elements, as listed below.

- 2.1 Primary Number and Title
- 2.2 Scope Note
- 2.3 Cross References
- 2.4 Records Retention and Disposition Schedule
 - 2.4.1 Active retention period column
 - 2.4.2 Semi-active retention period column
 - 2.4.3 Final disposition column
- 2.5 Office of Primary Responsibility (OPR)
- 2.6 Secondary Number and Title
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 - 2.6.3 Case file secondaries (-20 and higher)
 - 2.6.4 Coded series
- 2.7 Key of Terms (Abbreviations in Footer)
 - 2.7.1 Terms used in the active and semi-active disposition columns
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- 2.8 Freedom of Information and Protection of Privacy Flags
- 2.9 Explanatory Notes
 - 2.9.1 Qualifiers
 - 2.9.2 Other notes
- 2.10 Physical Format Designations
- 2.11 Vital Records Flags

This draft records schedule has NOT been approved under the provisions of the Document Disposal Act (RSBC 1996, c. 99) and DOES NOT constitute authority for disposition. Corporate Information Management Branch reviews and approves all records retention and disposition recommendations before an ORCS is sent for legislative approval, as required in the Document Disposal Act. For information regarding this ORCS, contact your Records Officer.

2.1

A SA FD

23120 EXTRATERRESTRIAL REGISTRATION AND TRACKING

Records relating to the registration of extraterrestrial visitors to the province. An extraterrestrial is any sentient being originating from another planet, regardless of appearance or ancestry.

2.2

Extraterrestrials are registered and tracked to ensure they do not contravene federal and provincial legislation by attempting world domination, body-snatching, or other anti-democratic activities. Registrants must provide identifying information and report regularly to the ministry liaison assigned.

Record types include registration forms, reference materials, photographs, videotapes, correspondence, memoranda, and reports.

2.3

For a description of the Extraterrestrial Registration System (ERS), see Information System Overview (ISO) section. For records relating to diplomatic etiquette and protocol used in communication with representatives of foreign governments, see ARCS primary 415.

2.4

2.5

Unless otherwise specified below, the ministry OPR (Unidentified Flying Objects Branch) will retain these records for:

CY+1y 3y DE

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

2.6

SO nil DE

- 00 Policy and procedures - OPR SO 5y FR
- 01 General - non-OPR SO nil DE
- 02 Complaints and inquiries
- 03 Extraterrestrial reports and statistics CY+1y 3y FR

FR = The government archives will fully retain these records because they document and analyse extraterrestrial visitors to the province.

2.7

(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

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			<u>A</u>	<u>SA</u>	<u>FD</u>
23120	<u>EXTRATERRESTRIAL REGISTRATION AND TRACKING</u>	(continued)			
-04	Visits by unidentified extraterrestrials (includes reference materials relating to visits and visitors as yet unconfirmed and unidentified)		SO	NA	NA
	NA = Reclassify records to appropriate case file under secondary 23120-20 when visitor is identified.				
	2.8 FOI: As extraterrestrials may present a threat to provincial security, access to these records is restricted under the <i>Freedom of Information and Protection of Privacy Act</i> (RSBC 1996, c. 165, s. 15(1)(b)).				
P/B	-20 Extraterrestrial registrant case files (arrange by registration number) (includes textual records and photographs)		SO+3y	300y	SR
	2.9 SO = when extraterrestrial visitor leaves the province				
	NOTE: The OPR will store extraterrestrial registrant case files under ongoing RCS accession number 99-9111.				
	303y = This ensures that the file can be reopened if the extraterrestrial returns later in its lifetime.				
	SR = The government archives will selectively retain these records because they document the effect of extraterrestrial visitors on the province. All files relating to green extraterrestrials will be retained. All other files will be boxed separately and destroyed.				
VR	-30 Extraterrestrial Registration System (ERS) (electronic database)		SO	nil	DE
	2.10 SO = when the function supported by the database is no longer performed by government				
	2.11				

A = Active
SA = Semi-active
FD = Final Disposition
PIB = Personal Information Bank
PUR = Public Use Records
OPR = Office of Primary Responsibility
I:\430-30\ufo_orcs.doc:2001/07/01

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

Schedule 777777

SO = Superseded or Obsolete
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ORCS/UFO HOW TO USE - 11

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.1 Primary Number and Title

Each heading covering a functional or subject grouping of records is allocated a unique five-digit primary number and title within ORCS. This primary is used to classify all information related to the relevant subject or function, regardless of its physical format.

2.2 Scope Note

The scope note describes the functions, uses and content of the records that are to be classified within a primary records classification. A scope note indicates the operational function to which the records relate and outlines the activities and/or work processes leading to records creation. It will also give a general statement about the record types (memos, forms, reports, etc.) and media (photographs, video recordings, etc.) covered, in a paragraph beginning "Includes" or "Record types include". If this paragraph does not appear to be comprehensive, the information should appear in "includes" qualifiers under the relevant secondaries.

2.3 Cross References

Cross references link the primary to related primaries, both within the ORCS and in ARCS. This information can be used to help determine whether records should be classified in a different place, and to ensure that related records can be viewed together. If electronic records are included or referred to in the primary, a reference for the Information System Overview (ISO) section will be included.

2.4 Records Retention and Disposition Schedule

Every ORCS includes a record retention and disposition schedule that indicates how long records should be retained in active storage space, when they should be transferred to semi-active storage, when they should be disposed of, and what their final disposition will be.

Scheduling information for each record series is indicated in the three columns to the right of the classification system information. These columns are headed A (Active), SA (Semi-active), and FD (Final Disposition). They correspond with the active, semi-active, and inactive phases of the life cycle of the record. The abbreviations used in each column are explained in 2.7, "Key of Terms."

For further information regarding the scheduling system used in ORCS, see 3.7.

2.4.1 Active Retention Period Column

The active (A) column indicates the length of time a record should be retained in the active phase of its life cycle.

Active records are used frequently and therefore are retained and maintained in the office space and equipment of the user.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Entries in the active column often use the designations of “CY” or “FY”, with an additional time period indicated. The following are examples of how to apply and interpret the active retention period using “CY” and “FY”.

CY+1y

Maintain all records created or received within the calendar year (1 January to 31 December) together until the end of the calendar year. Then retain them for an additional calendar year.

FY+1y

Maintain all records created or received within the fiscal year (1 April to 31 March) together until the end of the fiscal year. Then retain them for an additional fiscal year. When required by financial administration policy and procedures, place financial records relating to the prior fiscal year, but created or received after March 31, on the file for the prior fiscal year.

For information about Superseded or Obsolete (SO) and other terms and abbreviations used in the active retention period column, see 2.7.1. For file maintenance guidelines see 3.8.1.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are active for the calendar year (CY) of their receipt or creation, plus one more year.

2.4.2 Semi-active Retention Period Column

The semi-active (SA) column indicates the length of time a record will be retained in the semi-active phase of its life cycle.

Semi-active records are those that are used only occasionally and therefore need not be maintained in the expensive office space and equipment of the ministry or agency responsible for them. Semi-active records still retain administrative, operational, fiscal, audit, or legal value for the ministry or agency which created the records. Storage of semi-active records in economical, off-site facilities until all values have lapsed results in significant savings.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are semi-active for three years. This means they will be transferred to off-site storage until no longer needed, or in other words until the semi-active period is over. If required, these records may be retrieved from off-site storage during their semi-active phase.

For boxing and transfer instructions for semi-active records, see 3.9.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.4.3 **Final Disposition Column**

The final disposition (FD) column ensures that records with enduring value to the Province are preserved and those that have no enduring value are destroyed.

Records are eligible for final disposition when they become inactive, that is, when their active and semi-active retention periods have lapsed.

In the sample primary, extraterrestrial reports and statistics (secondary -03) are fully retained when they become inactive. This means they will enter the custody of the government archives and can only be accessed through the BC Archives Access Services (655 Belleville Street, phone 250-387-1952, website <http://www.bcarchives.gov.bc.ca>). Complaints and inquiries (secondary -02) will be destroyed under the primary default schedule.

2.5 **Office of Primary Responsibility (OPR)**

The retention and disposition requirements for records that are duplicated in central service or headquarters branches and field offices normally differ. In recognition of these differing requirements, every ORCS primary contains two statements regarding the levels of responsibility for records within a ministry or agency (known as the “unless and except statements”).

For each primary, ORCS distinguishes between the office having primary responsibility for a category of records (OPR) and all other offices which hold copies of the same records (non-OPRs). The OPR is the office that has been designated the holder of the official record for the ministry. The OPR maintains the official or master record in order to satisfy long-term operational, financial, legal, audit, and other requirements. All other offices holding duplicate copies are non-OPR offices and maintain their copies for a shorter retention period. All non-OPR retention periods and final dispositions are underscored.

In the sample primary, the Unidentified Flying Objects Branch is the OPR. All offices holding records covered by this primary are non-OPR.

For secondaries that have retention or disposition requirements different from the default retention and disposition values established for the primary, the OPR and/or non-OPR retention periods are listed in the columns to the right of the records classification.

Offices that have primary responsibility for the retention and disposition of records classified in each primary are responsible for retaining those records as the OPR. The Records Officer is responsible for tracking changes to OPRs as reorganizations occur, and for ensuring that OPRs and CIMB are aware of these changes.

2.6 **Secondary Number and Title**

Secondary numbers and titles designate specific series or groupings of records relating to the function covered by the primary. Secondary titles describe specific types of records and secondary numbers link them to the records retention and disposition schedule. The two-digit secondary number is added to the five-digit primary number to form a complete file number, for example, 23120-04.

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.

All offices must use the same secondary number to refer to the same series or grouping of records. Standardization ensures continuity and consistency in retention and disposition of operational records.

Three types of secondaries exist within *ORCS*: reserved secondaries, subject secondaries, and case file secondaries.

2.6.1 **Reserved Secondaries**

Reserved secondaries are secondary numbers used to cover records series which are repeated in several primaries.

Secondaries -00 and -01 are reserved throughout all *ORCS* and in *ARCS*.

Secondary number -00 is always reserved for "Policy and procedures" records. These files are used for records concerning operational functions, policies, procedures, regulations, and records which set precedents, reflect management decisions and usage, or document general goals and acceptable procedures of the creating ministry or agency. They include correspondence and other records relating to draft and approved policies on a specific subject including actual policy statements, interpretations of policy, development and discussion of policy, and policy decisions.

Secondary number -01 is always reserved for "general" records that cannot be classified in the specified subject or case file secondaries. Within each primary, the standardized secondary -01 is reserved as a general file. Records which meet one or more of the following criteria may be filed in the general file:

- The document does not relate to any of the existing secondaries, but does fall within the primary.
- There is no existing classification number for the document. The general number is used TEMPORARILY, until the subject is significant enough to warrant creating a new primary or secondary number and title. If you need to use the general secondary in this way, contact your Records Officer and see 3.14, regarding amendment and update of *ORCS*.
- The document contains information of a general nature and does not reflect actions or decisions of the creating office.

Note when filing anything under secondary -01 that its retention period may be shorter than that of the related subject or case file secondary, and/or the related secondaries may be scheduled for selective or full retention for the government archives. If this is the case, it is imperative that the file be reclassified before disposition.

If a document relates to two or more secondaries, you should be more precise and file the original or a photocopy of the record in each specific file. It is not appropriate to file such documents under "General" because this will cause access and scheduling problems.

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2.6.2 Secondaries -02 to -19 (subject secondaries)

Within a primary, secondaries -02 to -19 represent files for specific subjects and other non-case file series, that is, records filed chronologically in one file folder (e.g., inquiries or reports). These are commonly referred to as subject files. In the sample primary, secondaries -03 (extraterrestrial reports and statistics) and -04 (visits by unidentified extraterrestrials) are subject secondaries.

While the files covered by most subject secondaries can be organized chronologically, some need to be broken down into files covering different aspects of the same subject, different types of report, or some other organization. In these cases, subject secondaries may be coded. For an explanation of coded series, see 2.6.4.

2.6.3 Case File Secondaries (-20 and higher)

Case file series consist of many different files relating to a common function or activity. Each case file contains records pertaining to a specific time-limited entity, such as a person, event, project, transaction, product, organization, etc. The component records within each file in a case file series are generally consistent; that is, a file may contain a variety of documents (such as forms, correspondence, reports, and photographs), but this variety will be consistent with other files in the same series (for example, the same form may appear in every file). Case file series are assigned secondary numbers -20 and higher (-30, -40, -50, etc.). In the sample primary, secondaries -20 (extraterrestrial registrant case files) and -30 (the Extraterrestrial Registration System) are case file secondaries.

2.6.4 Coded Series

Case file secondaries are usually subdivided through the use of codes. A code identifies the specific person, event, project, or other entity covered by the file. Codes can take the following forms: proper names; acronyms, or alphanumeric codes developed within government. Consult your Records Officer if you wish to develop an appendix for your own set of codes.

In special cases, subject files may also be coded to facilitate retrieval (e.g., studies on different aspects of one interprovincial agreement). Coded subject files usually consist of many different files, each dealing with a different aspect of the same subject.

In references to coded files, an oblique (/) separates the identifying code from the secondary number.

In the sample primary, secondary -20 is indicated to be a coded case file series with a qualifier "(arrange by registration number)". A reference to one of these files might read "23120-20/000326".

2.7 Key of Terms (Abbreviations in Footer)

The key at the bottom of each ORCS page indicates the abbreviations used. An explanation of how to read and interpret the records schedule and the possible abbreviations for each of the three columns follows below.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.7.1 Terms Used in the Active and Semi-Active Retention Period Columns

The purposes of the Active (A) column and the Semi-Active (SA) column are explained in 2.4.1 and 2.4.2 respectively.

The following abbreviations are used, in combination with numbers, to indicate how long records will be kept in the office or offsite:

w = week

m = month

y = year

CY = Calendar Year (1 January to 31 December)

FY = Fiscal Year (1 April to 31 March)

SO = Superseded or Obsolete

"SO" identifies records that must be retained as long as they are useful and for which an active retention period cannot be predetermined because retention is dependent upon the occurrence of some event. This retention category is used in ORCS in the following different ways:

i) Routine Records

"SO" is commonly used to indicate the active retention period for routine records which are useful only for reference or informational purposes and which usually have no legal, fiscal, or audit values. In those cases, "SO" is not defined by a specific event or action. Rather, it is used to delegate to the creating offices the authority to decide when the records have no further value and are ready for storage or disposition.

The most common form of delegated disposition authority is:

<u>Active</u>	<u>Semi-Active</u>	<u>Final Disposition</u>
SO	nil	DE

This retention category is used throughout ORCS to streamline the disposition of records with short-term retention value, especially for non-OPR records. It delegates the entire responsibility for retention and disposition of the records to the ministry or agency responsible for them. Records with the above retention and disposition schedule may be destroyed when no longer required for operational purposes. In the sample primary, non-OPR policy and procedures files (secondary -00) are routine records which are designated SO.

For information on destruction services, contact your Records Officer.

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ii) **Specific Definition of SO**

"SO" is also used to identify the active retention period for records that must be retained until a case is closed or some other specified event occurs. In those cases, it is not possible to predetermine the length of time a file may be open and required for active use, and "SO" is defined in terms of some specific action, event, or the completion of a procedure.

In the sample primary, extraterrestrial registrant case files (secondary -20) are active for SO+3y, with SO defined as "when extraterrestrial visitor leaves the province". This means that the OPR will retain each file in active storage space for three years after the relevant visitor has left, after which the records will be transferred to off-site storage.

NA = Not Applicable

"NA" is used for records that, for some reason, are not covered by the secondary at the specified stage of their life. This is usually because the records are reclassified at the semi-active or inactive period, with some files moving to a different secondary from others, so they can be scheduled appropriately. The reasons for the "NA" designation may be stated in a "NA =" note, or in an "SO =" note or some other note under the secondary, as appropriate. In the sample primary, visits by unidentified extraterrestrials files (secondary -04) have a semi-active and final disposition of "NA" because files are reclassified to secondary -20 when the visitor is identified.

nil = no semi-active retention period

"Nil" is used in the semi-active column to identify records with no semi-active retention period.

Many types of government records remain active as long as they serve an operational function. When their usefulness for that function ceases, they have no semi-active retention period. If they have any residual operational, legal, fiscal, or other values, ORCS may specify in the final disposition column that they are to be transferred to the government archives. Otherwise, the final disposition of such records is usually physical destruction.

In the sample primary, the semi-active period for records in non-OPR offices is designated as nil. This means that as there is no semi-active period, the records are ready for destruction (as designated in the final disposition column) upon expiry of the active period.

2.7.2 Terms Used in the Final Disposition Column

The purpose of the final disposition column (FD) is explained in 2.4.3.

Some government records contain information or data that has long-term value to the agency responsible for them, the government generally, and/or to the public. These records are part of the documentary heritage of the Province of British Columbia and are transferred to the custody of BC Archives for archival preservation. The final disposition

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of operational records with enduring value can be full retention, selective retention, or destruction, as explained below.

FR = Full Retention

"FR" means that a government archivist has determined that all of the records covered by a secondary have enduring value. BC Archives, also known as the government archives, preserves records designated FR in their entirety. Under the terms of full retention, the archivist responsible may destroy unnecessary duplicates, publications, waste and scrap materials, ephemera (often published material of short-term value), and other items which are not an integral part of the record series. The reasons for full retention are explained in an "FR =" statement. In the sample primary, extraterrestrial reports and statistics (secondary -03) are FR "because they document and analyse extraterrestrial visitors to the province."

SR = Selective Retention

"SR" means that a government archivist has determined that a portion of these records have enduring value and should be retained. BC Archives, also known as the government archives, preserves a selection of the records designated SR, following explicit criteria. The reasons and criteria for selective retention are explained in an "SR =" statement. In the sample primary, extraterrestrial registrant case files (secondary -20) are SR "because they document extraterrestrial visitors to the province" and the selection criteria is to retain "all files relating to green extraterrestrials."

SR statements often include instructions requiring staff to box selected records separately from those to be destroyed. They may also require staff to help identify records to be retained under the selection criteria specified; this may involve consultation with the Records Officer and with an archivist from CIMB. The instructions for extraterrestrial registrant case files require that after records to be retained are identified, they are to be boxed separately from records to be destroyed.

Do not destroy records scheduled for selective or full retention. For instructions on how to box and transfer archival records to off-site storage, see 3.9.

Most government records serve no further purpose to government or to the public once they become inactive. The final disposition of such records is:

DE = Destruction

The final disposition of inactive records that have no residual value or insufficient public value to justify their preservation is physical destruction. In some cases, especially in section default primaries, the destruction is justified with a "DE =" note.

Some government records are reclassified in a new primary and/or secondary at the end of their active or semi-active retention period or are alienated from government, either through sale, gift, or loan at the time of their final disposition. The final disposition of such records is:

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NA = Not Applicable

See explanation of NA in 2.7.1.

2.7.3 Other Terms

The purpose of the other terms which appear in the key of terms is explained in other sections; see references below:

FOI =	Freedom of Information/Privacy	see 2.8
OPR =	Office of Primary Responsibility	see 2.5
PIB =	Personal Information Bank	see 2.8
PUR =	Public Use Record	see 2.8
VR =	Vital Record	see 2.11

2.8 Freedom of Information and Protection of Privacy Flags

All Personal Information Banks (PIB) and Public Use Records (PUR) must be flagged within BC Government records classification systems (see glossary for definitions). The flags are placed in the left-hand column, next to the relevant secondary. In the sample primary, the extraterrestrial registrant case files secondary (-20) is flagged as a PIB.

In certain instances, a more specific justification as to why the information contained in a record series is restricted, in whole or in part, from public disclosure is required for inclusion in the records classification system. In those cases, a special form of explanatory note ("FOI =") is used to explain the access restrictions for the secondary and to point to the section of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165) that allows for the exemption. In the sample primary, the visits by unidentified extraterrestrials secondary (-04) has an FOI note which quotes section 15 (1)(b) of the Act to justify restricting access.

For further information about FOI issues, see 3.10.

2.9 Explanatory Notes

Explanatory notes are used in the ORCS to provide information critical to understanding the records, to explain office procedures and practice, and to summarize provisions governing the creation, processing, accessing, and disposition of documents. They essentially function as scope and content notes for specific secondaries. The two types of explanatory notes are qualifiers and other notes.

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2.9.1 Qualifiers

Qualifiers provide information that will help users know what to expect when they actually view the files covered by a secondary. They are provided directly under the relevant secondary title, indented and placed in curved brackets. They are presented below in the order in which they appear below a secondary:

- “Includes” qualifier: this lists types or forms of records covered by the secondary. If there is no includes qualifier, see the “Includes ...” sentence in the scope note for this information. In the sample primary, the visits by unidentified extraterrestrials secondary (-04) “includes reference materials relating to visits and visitors as yet unconfirmed and unidentified.”
- “Arrange” qualifier: this gives the method of arrangement. In the sample primary, the extraterrestrial registrant case files secondary (-20) instructs records creators to “arrange by registration number.”
- Physical format qualifiers: see 2.10 for an explanation of this qualifier.

2.9.2 Other Notes

Other notes provide information to assist with applying schedules to the records; they also assist with comprehending the nature of the records and providing access to them. They are presented below in the order in which they may appear below a secondary.

- OPR =** This note provides the name of the office of primary responsibility if it is different from the primary default OPR. See discussion of OPR in section 2.5.
- SO =** This note explains when a file designated SO should be closed. See discussion of SO in section 2.7.1.
- ##y =** This note gives reasons for active and/or semi-active retention periods which are longer than seven years. In the sample primary, there is a “303y =” note under secondary -20.
- NA =** This note explains why the usual active, semi-active, or final disposition designation does not apply, usually because records have been reclassified or transferred to another agency. See discussion of NA in section 2.7.1.
- SR/FR/DE =** These notes explain why records are being selectively or fully retained, or (if not self-evident) why they are being destroyed. See discussion of these notes in section 2.7.2.
- FOI:** This note explains issues of confidentiality relating to the records. See discussion of the FOI note in section 2.8.
- NOTE:** This note provides any other useful information related to the scope of the secondary, such as history of the records, volume of the records, filing procedures, whether there is an ongoing accession number, or location of copies. In the sample primary, secondary -20 has a note specifying that when the files go offsite, they will be

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stored “under ongoing RCS accession number 99-9111.” For discussion of ongoing accession numbers, see section 3.9.1(b).

2.10 Physical Format Designations

All government records, regardless of physical format, must be classified under either an ARCS or an ORCS secondary number. Different physical format versions are all part of a single record series if the information content remains the same, with only the physical format varying. For example, there may be a paper (or “hardcopy”) version and a microfilm version of the same series.

When records are held in several different physical formats each version is identified and scheduled under the same ORCS secondary, unless the versions do not contain identical information or retention schedules vary. In those cases, the physical formats have separate secondaries, with the format identified in the secondary title rather than in a qualifier. The physical format designation is expressed as a qualifier under the secondary title. Retention periods are specified for each physical format designation, unless the primary's default retention periods apply. In the sample primary, the Extraterrestrial Registration System (secondary -30) is identified in a qualifier as an electronic database.

Some physical format designations used in ARCS and ORCS are: paper, microfiche, microfilm, computer output microfiche (COMfiche), computer output microfilm (COM), electronic database, electronic records, and optical disk.

A physical format designation is not used for the purpose of designating records in “special media” (sound recordings, audio-visual materials, maps, photographs, etc.). Information about special media is conveyed, instead, in an “(includes)” qualifier or in the paragraph of the scope note beginning “Includes” or “Record types include”. All the records in a file are covered by the same retention schedule, regardless of media. Related information in an electronic database is subject to the same schedule; for example, in the sample primary, registration information in the ERS (secondary -30) concerning a specific extraterrestrial can be purged when the relevant extraterrestrial registrant case file (under secondary -20) becomes inactive.

NOTE: ORCS approved prior to 2000 may contain secondaries with physical format qualifiers with different retention schedules.

2.11 Vital Records Flags

Vital records are those containing information essential to the functioning of government during and after a disaster, and essential for preserving the rights of citizens (see glossary for more detailed definition).

CIMB recommends that the vital records (VR) of a ministry or agency be flagged within a records classification system. The flag is placed in the left-hand column, directly in front of the secondary that it qualifies. In the sample primary, the Extraterrestrial Registration System (secondary -30) is flagged as a vital record.

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PART 3

ORCS AND AN EFFECTIVE RECORDS MANAGEMENT SYSTEM

3.1 The Purpose of ORCS

ORCS is a standard classification system for operational records. It is a system for the identification and management of operational records regardless of physical format (paper files, microfilm, optical disk, etc.) or media (maps, photographs, videotapes, etc.). It helps you find the information you need, when you need it, at the least possible cost. ORCS also provides a framework to manage the retention and disposition of records. With ORCS you can identify and preserve the essential and dispose of the valueless in a timely fashion.

ORCS integrates three vital records management concepts into one comprehensive management plan for your operational records. ORCS is organized to serve as a retrieval aid, a records classification system, and a records retention and disposition schedule.

A records schedule is a timetable describing and governing the lifespan of a record from the date of its creation through the period of its active and semi-active use, to the date of its disposition, either by destruction, transfer to the custodianship of the government archives, or removal from the control of the Government of British Columbia.

The records schedules incorporated into ORCS identify records of permanent value; protect the operational, audit, legal, and fiscal values of all records; and permit the routine, cost-effective disposition of inactive records.

3.2 Records and Recorded Information

The *Document Disposal Act* (RSBC 1996, c.99) establishes approval requirements for the retention and disposition of records and recorded information. An ORCS is approved under the provisions of the *Document Disposal Act* and describes types of operational records and specifies their retention periods.

The *Document Disposal Act* uses the term "record" as defined in the *Interpretation Act* (RSBC 1996, c. 238, s. 29). Record is defined broadly to include all recorded information regardless of physical format or media:

"Record" includes books, documents, maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise.

This definition applies to all recorded information created, kept, used, or filed by the ministries, commissions, boards, and other institutions of the Executive Government of British Columbia to which the *Document Disposal Act* applies.

The *Document Disposal Act* establishes procedures for the approval of the records schedules and classification systems developed by CIMB, government ministries, and other government agencies. This ORCS was reviewed by CIMB staff, your executive,

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the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this *ORCS* as the retention and disposition schedule for the operational records of Accommodation and Real Estate Services. This means that this *ORCS* is a legally binding document.

3.3 An Effective Records Management System

An effective records management system has five essential elements to aid retrieval and maintenance:

- the classification and scheduling system
- the file list
- finding aids (indexes and cross-reference guides)
- filing and maintenance procedures
- boxing and transfer instructions

3.4 The Classification System

A standard classification system such as *ORCS* is the cornerstone of an effective records management system. The classification gives an indication of what records are created and used by the ministry or agency and how the records are placed within a records system. The sections, primaries, scope notes, and secondaries of *ORCS* not only indicate standard classification and filing categories, but also aid access and guide retrieval.

ORCS is organized to facilitate records classification, retrieval, retention, and disposition. It is a block numeric records classification system based upon the federal government's model for the development of classification systems.

ORCS is a classification system based upon function and subject. Each functional or subject grouping of records is assigned a unique five-digit number which is called a primary number and is the system's main building block. This number is used to classify all information related to a subject or function, regardless of physical format.

Primaries which form a logical group of related subjects or functions are assigned sequential numbers in what is called a primary block. Each block contains primary subjects subordinate to the major function of the block.

Primaries are arranged in alphabetical order by title, except for the first primary within a section or primary block. The first primary is the general or "section default" primary and contains records of a general nature relevant to the entire section or primary block. The numerical arrangement of the section or primary block is sufficient to permit expansion and amendment.

A primary may cover a variety of types of records or files, such as policy and procedures, general and routine files, subject files, and case files. Each type is designated by a secondary number. Secondary numbers describe and delineate specific types or series of records. When a greater detail of files is required for any subject, the subordinate files may be coded.

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A secondary may cover records created in various physical formats (such as paper, microfilm, microfiche, and optical disk) and media (such as maps, photographs, videotapes). Records in different physical formats may contain the same information but be scheduled differently (for example, the paper and microfilm versions of the same file). Records in different media often contain different information but are filed and scheduled together (for example, textual records and photographs concerning the same building).

A secondary may be flagged for special access and preservation considerations, as a Personal Information Bank (PIB), Public Use Record (PUR), or a Vital Record (VR); see explanations of these terms in 2.8 and 2.11.

For a detailed analysis of primaries and secondaries, see Part 2, "How to Read a Primary."

The classification system is the basis for other finding aids, such as file lists and indexes. ORCS describes all of the operational records which might exist in an office responsible for the functions covered by the ORCS. The file list documents those files that have actually been opened. See 3.5 and 3.6 for discussions of file lists and other finding aids.

3.4.1 Staff Responsibilities and Procedures

CIMB recommends that each staff member be responsible for classifying documents which he or she creates. This includes recording the complete primary and secondary number on the top right hand corner of the document before it is printed, photocopied, filed, or distributed. Over time, your correspondents will begin to quote your file number on return mail and less incoming mail will require classification.

CIMB also recommends that the staff member responsible for opening, logging, and distributing incoming mail classify all incoming mail before it is distributed to the addressee. If that individual is unable to classify an individual item, he or she should refer it to the recipient for a primary and secondary number.

Each staff member is encouraged to organize working papers according to ORCS.

One individual within each filing area should have overall responsibility for the central filing system, ensuring that filing procedures, file lists, and finding aids are accurately maintained. He or she will liaise with the staff member responsible for procuring records equipment and supplies. This individual will also check classifications assigned by others and, in the event of amendments, will update the mail logs, file lists, etc.

3.4.2 Classifying Records

It is important to be consistent in assigning primary and secondary numbers, as filing and retrieval is dependent upon the classification number assigned to a document.

CIMB recommends that a memo deal with only one subject. Occasionally, it may be necessary to photocopy a document which deals with more than one subject, place it on two or more files and cross-reference it appropriately. If the document has more than one page, only photocopy the first page and cross-reference it to the location of the complete document.

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Records are classified based upon how they will be referenced and retrieved. In order to select a classification number, first read and understand the document. The subject is not always obvious. When the document deals with more than one subject and you are having difficulty classifying it, think about where someone other than yourself would look first for the information.

When classifying the document, use the alphabetic subject index and/or the broad subject approach to find the appropriate secondary. Remember that the secondary relates to the subject and purpose of the document and not necessarily the sender or recipient.

a) Alphabetic Subject Index

To use the index, think of various subject terms which describe the record. Look under that term or synonyms in the index. Locate a number, and then refer to that primary block in the classification system to ensure that the number is the best possible one. Reading the primary scope notes will clarify whether or not a document should be classified in a given primary. Often the cross-references listed below the scope note will lead to a more appropriate primary. If the appropriate classification proves difficult to locate, you may want to contact your Records Officer and suggest an update to the index. For a discussion of the index, see 2.4.

b) Broad Subject Approach

When it is difficult to describe a document in subject terms, decide under which of the main primary headings the record is most likely to fall. Turn to the list of primaries for the most relevant ORCS section, pick one or more primaries which might be applicable and then browse through those primaries, reading scope notes and reviewing secondary numbers and titles. Choose the most appropriate primary and secondary and classify the document accordingly.

3.5 The File List

The file list is a listing of every file created by or currently in use within an office. An accurate file list is an essential tool, as it documents the creation and existence of government records. It assures the integrity and authenticity of records and may serve as legal evidence.

The file list is vital to ORCS and is a primary tool for the retrieval, control, and maintenance of records. The *Administrative Records Classification System (ARCS)* specifies that file lists will be maintained and classified under ARCS 423 "Records Management - File Control". ARCS 423-03 classifies current lists covering both operational and administrative files.

The file list is also a ready retrieval guide. For the frequent user, it indicates which files have been opened and quickly directs the user to the proper primary and secondary. If a file does not appear on the current file list, a file may be opened under the appropriate primary and secondary. File lists should be regularly updated.

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3.6 Other Finding Aids

A wide variety of finding aids may be created and used to facilitate retrieval and classification of operational records. These include subject and keyword indexes, automated retrieval systems, file tracking systems, and lists of case file codes and corresponding titles.

Offices may also develop indexes to meet special needs, including subject cross-reference indexes, automated keyword indexes, proper name indexes, geographic location indexes, etc. The indexes themselves are classified in ARCS 423-05. Please note that they are selectively retained by the government archives.

The index contains an alphabetical listing of primary and secondary subjects, frequently used terms, organizations, form titles or numbers, etc. This index is the main access point by which the user may quickly locate a subject and the appropriate primary. For commonly used subjects or forms, the index allows rapid access into the classification system in order to determine a primary number.

As a further aid in the retrieval and classification of administrative and operational records, CIMB provides ARCS *Online* web site links to lists of standard codes compiled by various ministries and agencies of the British Columbia Government. For information about using coded series, see 2.6.4. For guidance in developing codes, see ARCS Appendix A.

3.7 The Scheduling System

An essential element of ORCS is the retention and disposition schedule. This schedule is based on the concept that records have a three-stage life cycle.

During the “active” stage, records are needed for frequent reference and updates. At this stage, therefore, records are maintained and stored in the offices of the ministry or agency responsible for the records.

During the “semi-active” stage, records are needed for occasional reference and/or for legal, fiscal, or audit purposes. At this stage records are transferred to the off-site storage facilities provided by Records Centre Services, CIMB (see 3.9 for boxing and transfer instructions).

When records retrieval ceases, and records no longer have any operational, administrative, legal, fiscal, audit, or other primary values, the records become “inactive,” and are ready for final disposition. Based on archival appraisal decisions, the final disposition may be to destroy the records, or to fully or selectively retain them for the government archives.

By retaining records for the retention periods specified in the records schedule, creating offices comply with statutory, regulatory, and policy requirements to maintain certain types of information and data. By disposing of records as specified in the records schedule, creating offices ensure that records of enduring value are preserved for the province, in accordance with Legislature-approved ORCS.

The three stages of the records schedule are expressed in three columns on the right-hand side of the primary page, beside the relevant classification information (primary

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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numbers, titles, and notes). These columns are labelled “A” for active, “SA” for semi-active, and “FD” for final disposition. Appropriate numbers and abbreviations appear in these columns beside the relevant secondaries, indicating what should be done with the records during each stage of the schedule. Notes below the secondaries give any needed explanation and instructions about implementing the schedule.

For further information on the records retention and disposition schedule as it appears in a primary, refer to section 2.4.

3.8 Filing and Maintenance Procedures

Filing and maintenance procedures are essential to the use and maintenance of any record-keeping system. They are vital to records control. They establish rules for consistency of classification and control of location and access. They provide a set of regular operations for identifying records, incorporating them into the classification system, controlling their use, and disposing of them when no longer required.

The basic activities involved in filing and maintenance are:

- mail management
- sorting
- registration
- classification
- indexing and cross-reference
- location control
- filing
- charge-out
- distribution
- recall and search
- re-filing
- physical maintenance
- purging
- retention and disposition

Requirements for records retrieval, control, and maintenance vary from office to office, and filing and maintenance procedures should reflect these needs. There are a variety of methods and systems which can provide effective operations for these basic functions. Contact your Records Officer for advice.

Use of *ORCS* does not dictate a specific set of procedures for registration, indexing, location, charge-out, etc. Rather, *ORCS* is flexible so that it can fit into a wide variety of record-keeping environments.

To effectively implement and maintain *ORCS*, offices should develop and document records management procedures. Filing and maintenance procedures are classified in *ARCS* 423-00. Your Records Officer can help to develop appropriate procedures for your office.

3.8.1 File Maintenance

An *ORCS* covers many types of operational records stored in various physical formats. The ministry or agency responsible for the records has special needs and requirements

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for its filing system. Each ministry or agency must establish standards for maintaining their files. The following system of file maintenance works well.

When incoming mail and other records have been classified, they are filed in folders labelled with the complete primary and secondary number and corresponding title.

Government has standardized the use of letter size file folders, paper and filing equipment wherever possible. The purpose of ending the use of legal size files is to reduce government costs by eliminating the necessity of having both legal and letter size papers for records and correspondence. Contact your Records Officer for further information about this important choice.

File folder labels are increasingly generated by records management databases, however it will sometimes be necessary to generate a label manually. Prepare the file folder label with the primary and secondary number on the left and the title on the right. It is not necessary to type the full title in all cases. Type the portions of the title which make the label meaningful. Common sense is used to prepare labels which are concise, yet distinguish files adequately.

The actual file sequence and physical location within the office will be dictated by access requirements and indicated on the file list.

Prepare documents for filing by checking that the primary and secondary number is indicated, paper clips are removed, and duplicate copies of no further value are discarded. Documents should be filed in chronological order with the oldest on the bottom.

In the case of flimsy paper, such as teletype documents and facsimile documents not produced on bond paper FAX machines, photocopy the information onto bond paper prior to filing and discard the flimsy copy. Flimsy paper facsimile documents rapidly deteriorate and the information they contain is lost when this procedure is not followed.

Monitor the files for bulk and when the paper thickness exceeds the scoring on the bottom of the folder, close the full folder and start a new one labelled volume 2, 3, 4, etc. Place a coloured paper as the top document in order to indicate that a file is closed. Indicate on that coloured sheet the date range and where future information will be filed. Related volumes are stored together while they are active, and older ones are placed in semi-active storage when their active retention period expires. If multi-volume sets are frequently opened under a single classification, this may indicate the need to create new, more specific classifications.

Where possible, sheets should be fastened in the file folder. When this is not possible or for ease in culling files at the end of the year, CIMB recommends attaching documents to a file back sheet. The file back should be labelled with the fiscal or calendar year and classification number. Use a closed file notice for each file back when the file is closed and mark on it the method and date of final disposition (e.g., "for DE on 1 April 1999"; "for SR on 1 January 2010"; "for FR on 1 April 2001").

Minimize misfiling in the following ways:

- keep file labels legible and simple
- maintain 3-4 inches of free space on each file shelf or drawer

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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- place papers in folders so they do not go beyond the scoring on the folder or cover the file label
- write the correct file number or heading on each document or underline it if it appears in the text

3.8.2 File Circulation

To avoid loss of files, especially when numerous staff refer to the same records, use circulation or "out" cards when removing a folder from the cabinet. Write the borrower's initials on the out card. Only remove papers for photocopying and return the papers to their original location in the file. Return files promptly after use.

When photocopies are made for use as working papers, mark them clearly as a "copy" with a stamp which uses a colour of ink other than black.

3.9 Boxing and Transfer Instructions

The records schedules contained in ORCS specify the active, semi-active, and inactive phases of the life cycle of the record and provide for the efficient and systematic transfer of semi-active and inactive records to the off-site storage facilities provided by Records Centre Services, CIMB. Each office should document instructions and procedures for the regular boxing and transfer of records to off-site storage. (For further discussion of records scheduling, refer to 2.4 and 2.7.)

In some cases the records schedule will provide for the immediate destruction of records when they are no longer active. In this case, contact your Records Officer. The Records Officer can provide you with information about the availability of recycling and/or destruction services. Use appropriate forms and procedures as instructed by your Records Officer and **notify your Records Officer before any destruction of records occurs.**

To identify records suitable for boxing, review the files against the ORCS schedules annually and determine what operational records have become semi-active or inactive during the past year. If your office uses an automated database to track files, it may be possible to generate this list automatically. When the list is ready and records are boxed, contact your Records Officer to report that you have semi-active or inactive scheduled operational records which are ready for transfer. Your Records Officer will then request off-site storage and retrieval services from Records Centre Services.

If accumulations of active records produce space problems in office areas before the annual review, contact your Records Officer.

3.9.1 Accession Numbers

Records Centre Services issues and tracks all accession numbers. An accession number is a number identifying a group of records to be transferred, and is used to label, transfer and store records. Each box within an accession is given a unique box number

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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by adding sequential numbers, beginning with number one, to the accession number. The full number must appear on the label of each box.

For the purposes of illustration, we will use 91-0123 as an example of an accession number. No office should use it to prepare records for transfer!

Box Number: 91-0123-01

91-0123 = the accession number issued by Records Centre Services
-01 = the first consecutive box number in accession 91-0123

There are two types of accession numbers: one-time and ongoing.

a) One-time Accession Numbers

A one-time accession number is used by a single office for a one-time transfer of records to Records Centre Services. For further information about one-time accession numbers, contact your Records Officer.

b) Ongoing Accession Numbers (OANs)

CIMB may establish ongoing accession numbers for categories of administrative or operational records which can be transferred to off-site storage or archival custody year after year. The purpose of an OAN is to group together the same type of records from the same office, and facilitate transfer of those records. The OAN for a category of records must only be used for future transfers of the same type of records.

The "NOTE" format indicated below is used in ORCS to annotate secondary numbers and titles to which an OAN applies.

NOTE: The OPR will store [SECONDARY TITLE] under
ongoing RCS accession number 91-0123.

If 91-0123 were a real OAN, the office to which it was issued would use it for a specific record series or category of records. Accession number 91-0123 is reserved for use by the same office for the same record series until box number 9999 is reached. Then, please ask your Records Officer to obtain a new OAN from Records Centre Services.

An ongoing accession number differs from a one-time number in that box numbers within an accession are always consecutive. For example, if box numbers 91-0123-1 to 91-0123-10 were transferred in July 1991 and ten more boxes were ready for transfer in October 1992, the box numbers used in October 1992 would begin with the next unused number (i.e., in October 1992 numbers 91-0123-11 to 91-0123-20 would be used).

The OAN uniquely identifies the transferring office and the category of records which may be transferred as part of the accession.

If several offices are responsible for transferring records of the same type to semi-active storage or archival custody, each office will be assigned its own OAN.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Other special arrangements may be made in consultation with your Records Officer and Records Centre Services.

3.9.2 Transfer of Records to Off-Site Storage

Records Centre Services manages off-site storage for all records having a scheduled semi-active retention period, and for all inactive records scheduled for selective or full retention. Contact your Records Officer if you have concerns about the following:

- if a records schedule does not provide for semi-active storage for a record series which, in your opinion, requires it
- if a records schedule does not provide for the archival retention of a record series which does, in your opinion, have evidential or historical value, or
- if you require off-site storage for active records.

a) Arranging Boxes

Organize records for transfer as follows: (These guidelines are based on the *ARS 517 "Authority to Apply Approved Schedule" Standards and Orientation Guide*).

1. Do not put files covered by different retention and disposition schedules (*ARCS* - 100001 or *ORCS*) in the same box.
2. Box records scheduled for destruction (DE) separately from records scheduled for selective retention (SR) or full retention (FR).
3. Box SR records separately from FR records. Contact your Records Officer if your office does not generate a sufficient volume of records to allow for full separate boxes.
4. If records have no scheduled semi-active retention period and a scheduled final disposition of SR or FR (e.g., SO, nil, SR), box them separately from all other records. Arrange the files within the box by primary and secondary number. Contact your Records Officer if your office does not generate a sufficient volume of records to allow for full separate boxes.
5. Place records of the same or similar retention periods and date ranges in the same box.
6. Whenever possible, box records of the same type together (e.g., case file series or large subject file series should be boxed together).
7. If records have different semi-active retention periods, box first by retention period and then within retention period by primary and secondary numbers.

b) Box Numbering

Arrange and number boxes that have similar classifications, date ranges, retention periods and final dispositions consecutively according to the date range of the records (e.g., accounts payable, fiscal year 1994/95 in boxes 1 & 2; accounts

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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payable, fiscal year 1995/96 in boxes 3 & 4; accounts payable, fiscal year 1996/97 in boxes 5 & 6).

c) **Boxes With Varied Classifications, Retention Periods And Date Ranges**

Please consult with your Records Officer when records within a box have varying classifications, retention periods and date ranges.

Records Centre Services provides off-site storage for all inactive records scheduled for selective or full retention. If a records schedule does not provide for the archival retention of a record series which does, in your opinion, have historical, archival, or other residual values, contact your Records Officer to propose that the schedule be amended.

3.10 Freedom of Information and Protection of Privacy

The purpose of the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c. 165) is to ensure that the public has the right to access government records and to protect personal information about an individual from unauthorized collection, use or disclosure by public bodies. That legislation affects the design, development, retention scheduling, and implementation stages of all operational and administrative records classification systems.

To determine whether your records are outside the scope of the legislation, whether your records contain personal or confidential material, and what procedures for information disclosure exist within your ministry or agency, contact your Director/Manager of Information and Privacy. If you have questions specific to file operations or procedures, contact your Records Officer. For information about FOI notes in the ORCS, see 2.8.

3.11 Electronic Records and the Information System Overview

Information that has been created, collected, maintained and/or retained by a government ministry or agency is classified and scheduled within ORCS, regardless of media or physical format. The additional technical information required for the scheduling of electronic records is documented using the standard format for the Information System Overview (ISO) and Information System Overview for a Subsystem (ISOS). See the ISO section of this ORCS.

The Information System Overview (ISO) serves three main purposes:

- to provide a high-level description of the function and information content of the system, in other words a map of the data managed by the system and the major stages through which it flows while being processed;
- to document the records-keeping context of the system by identifying how the system and related records are classified in the ORCS;
- it may be used to schedule the electronic system by indicating when its active life ends and what the final disposition will be.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Electronic records (that is, the records created and maintained on an electronic system) are scheduled as secondaries like all other forms of records, as well as being documented in the ISO. An electronic system may be scheduled in the Information System Overview Section, and also may be included under the primary covering the function or activity to which it relates; for example, the Extraterrestrial Registration System (ERS) appears as secondary -30 in the sample primary. A system related to functions covered by an entire section of the ORCS will appear in the section default primary, or if it relates to the entire ORCS, in the ORCS default primary. Information in the database relating to specific entities is covered by the schedules relating to the relevant case files; for example, the registration information in the ERS concerning a specific extraterrestrial can be purged when the relevant extraterrestrial registrant case file (under secondary -20) becomes inactive.

Electronic mail (or "e-mail") should be classified and filed under the secondaries covering the relevant functions and activities. For further information on e-mail, see special schedule 102903 in the ARCS manual.

3.12 **Implementation of ORCS**

Each ministry, government agency and Crown corporation has a designated officer responsible for implementing and coordinating records management procedures. This records officer, often called the Ministry Records Officer (or MRO) or Corporate Records Officer (CRO), should be contacted for further information whenever necessary. If you cannot determine who your Records Officer is, call CIMB at 250-387-1321.

The Records Officer plans and coordinates the implementation of ORCS.

The eight requirements for implementation and maintenance of ORCS are:

1. Executive support.
2. A records management policy.
3. An implementation and training plan.
4. Designated responsibilities for implementation and maintenance of ORCS.
5. Designated offices of primary responsibility for types of operational records requiring multiple levels of retention.
6. Training in ORCS and general records management for support staff in a training program established by your Records Officer.
7. Established procedures for the storage and retrieval of semi-active records and disposition of inactive records.
8. Established maintenance, review, and update procedures under the administration of the Records Officer.

3.13 **Advisory Services**

CIMB provides limited advisory services to assist records officers with the implementation and maintenance of ORCS. Your Records Officer is available to help you establish efficient filing procedures and effective records administration. Other services which may be provided by your Records Officer are as follows:

- project planning and coordination assistance

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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- file conversions
- a records management training program
- selection of filing equipment and supplies
- assistance with retrieval systems, indexes, file tracking, and active records control
- off-site storage and retrieval of semi-active records
- disposition of inactive records
- transfer of permanently valuable records to archival custody
- automation of records management functions

3.14 **Amendment and Update of ORCS**

Maintenance of *ORCS*, including the use of primaries and secondaries, is a joint responsibility of the records holder and the Records Officer.

Effective maintenance depends upon:

- trained records staff
- documented policies and procedures
- coordination and review by the Records Officer
- designated responsibilities for:
 - records classification
 - maintenance of indexes and file lists
 - other record and file operations

CIMB maintains the master edition of this *ORCS* and is responsible for administering the amendment and review process. The Records Officer is responsible for advising CIMB of proposed amendments. Amendments take effect upon the approval of the Legislative Assembly. Distribution of amendment pages and implementation of amendments is a responsibility of the ministry or agency.

Filing instructions and explanations of changes accompany the distributed amendments. After updating the *ORCS*, insert the instructions behind the Register of Amendments, located at the front of the *ORCS* manual. Date and sign the Register of Amendments.

Offices should refer proposals for new primaries and secondaries or other suggested changes to their Records Officer, who will in turn refer them to CIMB. Proposals will be jointly reviewed by CIMB staff and the Records Officer. While awaiting formal approval, "interim secondaries" may be established. These must be different from any existing secondary numbers and titles. Include records covered by interim secondaries in file lists, and highlight them on the Records Officer's copy of each file list. Once interim secondaries are approved, they will be included in future editions of the *ORCS*.

Changes in the status of primaries, secondaries, and scope notes will be highlighted on the far left of each relevant primary page, in two ways:

- || Double vertical bars indicate a proposed change at the primary or secondary level or to a scope or explanatory note. Proposed changes may be used for

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classification purposes, but require the approval of the Legislative Assembly before they may be used for records disposition actions.

- A bullet indicates a change at the primary or secondary level which has been approved by the Legislative Assembly.

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A SA FD

ACCOMMODATION AND REAL ESTATE SERVICES

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 Accommodation and Real Estate Services (ARES) under the *Public Agency Accommodation Act* (SBC 2006, c. 7).

These records document the management of owned and leased properties entrusted to ARES, including the provision of real estate, leasing, planning, project, and property management services, and related pricing and client charges.

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 the establishment of ARES' predecessor, the British Columbia Buildings Corporation in 1977, as well as earlier records related to real estate services beginning in 1871 with the Department of Lands and Works. Previous records relating to the functions documented in this *ORCS* have been appraised and scheduled under one-time records schedule(s) or 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
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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	<u>A</u>	<u>SA</u>	<u>FD</u>
1) <u>Policy and Procedures</u> (secondary -00 throughout ORCS, except 79700-00 and 79800-00) (secondaries 79700-00 and 79800-00)	SO SO	nil nil	FR DE

FR = Throughout this section, the government archives will fully retain policy and procedure files created by offices having primary responsibility for policy and procedure development and approval. These records have evidential value.

2) <u>Master Service Agreement (MSA) and Compliance Files</u> (secondary 75000-02) (secondary 75000-20)	SO SO	7y 7y	FR DE
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These records document the terms, conditions, and indemnities in the MSA for property management and project delivery services, as well as the service provider's compliance with the MSA.

SO = upon expiry or termination of MSA and all extensions

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

FR = The government archives will fully retain the MSA contract and amendments because they document the provincial government's partnership with a private company for the provision of property management and project delivery services.

3) <u>Real Estate Project Files</u> (secondaries 77000-20 and -30) (secondaries 77000-25 and -40)	SO SO	7y 7y	FR DE
---	----------	----------	----------

These records document real estate acquisition and disposal projects, the reuse or disposal of major real estate assets (e.g., Riverview property and Jericho Hill School), minor real estate projects (e.g., sewer lines through government property), and projects involving assistance to other government agencies (e.g., Provincial Capital Commission and school boards) on the disposal of their real estate assets.

SO = upon completion or abandonment of project

(continued on next page)

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A SA FD

7y = The retention period provides sufficient time for research and consultation and ensures that agreements or contracts included in these files are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

FR = The government archives will fully retain major real estate project files and real estate acquisition and disposal files for their significant evidential and informational values. These records provide the most comprehensive source of information on owned properties entrusted to ARES and document planning activities related to the reuse or disposal of major parcels of land owned by the provincial government, as well as long-term effects on communities in the province.

4) Property Stewardship Building and Land Records

(secondaries 76400-20 and -40)	SO	7y	FR
(secondary 76400-02)	SO+10y	nil	DE
(secondary 76000-20)	SO	7y	DE

These records document properties owned, leased, and managed by ARES.

SO = when property is sold or lease is terminated

10y = Electronic building and land information is retained for 10 years for research and analysis purposes.

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

FR = The government archives will fully retain building and land inventory files for their significant evidential and informational values. These files document the history of all buildings and land owned, leased, or managed by ARES.

5) Heritage Building Plans and Drawings

(secondary 76400-03)	SO	nil	FR
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These records document the design and layout of heritage buildings owned by ARES.

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A SA FD

SO = when scanned and digitized images have been verified for quality and backup has taken place

FR = The government archives will fully retain original paper plans and drawings for designated heritage buildings because they document public heritage buildings as they were constructed. These buildings have significant historical and architectural value.

- | | | | | |
|----|---|----|-----|----|
| 6) | <u>Building Technical and Design Standards and Handbooks</u>
(secondaries 76300-65 and 79600-03) | SO | nil | FR |
|----|---|----|-----|----|

These records document the provincial government's standards for the construction and interior design of various types of government buildings and office space.

FR = The government archives will fully retain building technical and design standards and handbooks for their significant evidential and informational values. These records document the provincial government's standards for the design and construction of the various types of public buildings, as well as for indoor air quality and ventilation system maintenance.

- | | | | | |
|----|---|----|-----|----|
| 7) | <u>Accommodation Plans and Demand Forecast Reports</u>
(secondaries 76000-03 and 79600-02) | SO | nil | FR |
|----|---|----|-----|----|

These records document the government's accommodation needs and requirements, as well as the availability of accommodation space throughout the province.

FR = The government archives will fully retain one copy of each accommodation plan and demand forecast report for their evidential and informational values. These records summarize the requirements and issues related to the supply of properties owned, leased, or managed by the government in each of the regions of the province. They also document issues and requirements for the provision of office space for the Government of British Columbia, as well as the accommodation needs and space requirements of ministries, including ministry accommodation budget information and profiles of buildings currently occupied by ministries.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
8)	<u>Hazardous Substance and Contaminated Site Remediation Records</u> (secondaries 76300-30 and 79700-30)	SO	100y	DE

These records document the remediation of approximately 200 contaminated highway and forestry yards owned by the Province, as well hazardous substance (e.g., asbestos, mould, and radon gas) testing and remediation in owned properties.

SO = when property is sold

100y = Legal counsel has advised that 100 years provides a reasonable length of time to provide evidence of the condition of the property at the time it was sold.

9)	<u>Indoor Air Quality Testing and Ventilation System Maintenance Records</u> (secondaries 79800-02 and -06)	SO	7y	DE
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These records document indoor air quality (IAQ) testing in owned buildings, and ventilation system maintenance in both owned and leased buildings.

SO = IAQ tests are retained until completed and corrective measures are implemented; and ventilation system maintenance records are retained until the related equipment is replaced or disposed of, or when property is no longer leased or owned (whichever is earlier)

7y = The retention period for IAQ tests is consistent with the retention period for related occupational health and safety records held by client ministries under *ARCS* 1560-06. The seven-year retention period for ventilation system maintenance records is stipulated in the *ARES Mandatory Preventative Maintenance Standard* (which is classified under secondary 76300-65).

10)	<u>Building Technology Advice and Green Building Services Files</u> (secondaries 76300-20 and -50)	SO	7y	DE
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These records document technical advice on interior and exterior architectural elements, as well as advice, projects, and programs related to the integration of green building principles and practices into building requirements. An engineer's stamp is not affixed to these records.

(continued on next page)

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 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

SO = Technical advice records are retained until the property is sold or lease terminated. Green building records are retained until information is provided or project is completed or abandoned.

7y = The retention period provides sufficient time for research and consultation, and ensures that contract management records included in these files are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3)..

- | | | | | |
|-----|---|-------|----|----|
| 11) | <u>Environmental Management System (EMS) Administration Files</u>
(secondary 76300-40) | FY+1y | 9y | DE |
|-----|---|-------|----|----|

These records document the administration of an EMS for ARES consistent with International Organization for Standardization ISO14001 requirements. They include EMS objectives and procedures, as well as the tools and resources to support EMS; the tracking, monitoring, and analysis of environmental targets; and internal audits for EMS compliance.

11y = The retention period is based on three ISO 14001 registration cycles and provides sufficient information for ISO 14001 compliance audits.

- | | | | | |
|-----|---|--------|-----|----|
| 12) | <u>Pricing and Customer Service Records</u>
(secondaries 73000-03, 76500-04, 76600-03)
(secondary 73000-40)
(secondaries 76500-20 and -30)
(secondary 73000-02) | SO+10y | nil | DE |
| | | SO | 7y | DE |
| | | SO+2y | nil | DE |
| | | FY+1y | 6y | DE |

These records document accommodation pricing, and customer accommodation requests, approvals, and budgets.

SO = Customer service requests and agreements are retained until the customer vacated the property; pricing information is retained until the lease is terminated or property is sold; and accommodation budgets are retained until the end of the fiscal year in which the information is provided

10y = Electronic customer request and pricing information is retained for 10 years for analysis and forecasting purposes.

(continued on next page)

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

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NA = Not Applicable
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A SA FD

7y = Customer agreements are retained for the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s. 3). Customer budgets have the same retention period as related budgeting records classified in ARCS.

13)	<u>Lease, Corporate Let, and Parking Management Records</u> (secondary 79200-20) (secondaries 79200-02 and 79500-03) (secondaries 79200-30 and 79500-20 and -30) (secondary 79200-03)	SO+2y 8y SO+10y nil SO+2y 5y SO 7y	DE DE DE DE
-----	---	--	----------------------

These records document lease and parking licence arrangements with landlords and the leasing of surplus space to private sector tenants.

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

10y = Lease case files are retained for two standard five-year lease terms to ensure the information is available in the event the releasing of a property is being considered. Electronic lease, corporate let, and parking information is retained for 10 years for reviewing trends and predicting costs.

7y = Agreements and corporate let and parking arrangement case files are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

14)	<u>Planning Project Files</u> (secondary 79600-20)	SO	7y	DE
-----	---	----	----	----

These records document the development of strategic accommodation plans, demand forecasts, needs analyses, and feasibility studies.

SO = when project is completed, closed, or cancelled

7y = The retention period provides sufficient time for research and consultation and ensures that contract management records included in these files are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

(continued on next page)

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A SA FD

7y = The retention period is consistent with the ARCS retention period for financial accounting records, and ensures that records required for Goods and Services Tax (GST) audits are retained for the six-year records retention requirements under the *Excise Tax Act* (RSC 1985, c. E-15, s. 286[3]).

- | | | | | |
|-----|--|-------------|------------|----------|
| 17) | <u>Tangible Capital Asset Accounting Records</u>
(secondaries 72000-20 and -30)
(secondary 72000-03) | SO
FY+9y | 10y
10y | DE
DE |
|-----|--|-------------|------------|----------|

These records document the costs associated with the acquisition, disposal, improvements, furnishings, fixtures, and equipment of ARES owned properties.

SO = when property is sold or building demolished and, if leased back, when no longer required for reference purposes

10y = The retention period is based on two standard five-year lease terms, as well as analysis and forecasting requirements.

- | | | | | |
|-----|--|-------|-----|----|
| 18) | <u>Annual Major Asset Maintenance Budget Authorization Records</u>
(secondary 76000-02) | FY+9y | nil | DE |
|-----|--|-------|-----|----|

These records document the authorization of maintenance and construction projects planned for the upcoming fiscal year.

10y = The retention period provides sufficient time for analysis and forecasting.

- | | | | | |
|-----|---|-------------|----------|----------|
| 19) | <u>Strata Corporation Records</u>
(secondaries 76800-03 and -08)
(secondary 76800-07) | SO
FY+1y | 7y
6y | DE
DE |
|-----|---|-------------|----------|----------|

These records document strata corporations created for owned properties (currently the Waddington Building and bare land strata in the Dease Lake area). The retention periods are based on *Strata Property Regulation* (B.C. Reg. 43/2000, s. 4.1) records retention requirements.

SO = Contracts and insurance policies are retained until termination or expiry. Plans and legal documents are retained until dissolution of strata corporation

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

7y = Contracts and insurance policies are retained for the six-year retention period required under the *Strata Property Regulation* (ss. 4.1[4] and 4.1[7][b]). Plans and legal documents are retained for the six-year limitation period under the *Limitation Act* (RSBC 1996, c. 266, s. 3). Financial records are retained for the six-year retention period required under *Strata Property Regulation* (ss. 4.1[3]) and 4.1[7][e]) and for consistency with the retention period for *ARCS* financial records.

20) Electronic Records

DE

The following electronic systems are covered by the ISO section in this *ORCS*: @REALBC and Requests, Agreements, and Projects (RAP). 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.

21) 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 400-02). These records have no enduring value to government at the end of their scheduled retention periods.

A = Active
SA = Semi-active
FD = Final Disposition
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OPR = Office of Primary Responsibility

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A SA FD

SECTION 1

ACCOMMODATION AND REAL ESTATE SERVICES

PRIMARY NUMBERS

70000 - 79999

Section 1 covers records relating to the provision of accommodation and real estate services to B.C. government ministries and agencies and private sector tenants under the *Public Agency Accommodation Act* (SBC 2006, c. 7). This includes records relating to the: management of owned and leased properties entrusted to Accommodation and Real Estate Services (ARES); provision of real estate, leasing, planning, project, and property management services; and determination of prices and client charges.

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
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

SECTION 1

70000 - ACCOMMODATION AND REAL ESTATE SERVICES - 79999

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73000 CUSTOMER SERVICES

75000 MASTER SERVICE AGREEMENT MANAGEMENT

76000 PORTFOLIO MANAGEMENT - GENERAL

- 76200 - EMERGENCY MANAGEMENT
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A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete		
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
70000	<u>ACCOMMODATION AND REAL ESTATE SERVICES - GENERAL</u>			
	Records not shown elsewhere in the accommodation and real estate services section which relate generally to the provision of accommodation and real estate services to B.C. government ministries and agencies and private sector tenants under the <i>Public Agency Accommodation Act</i> (SBC 2006, c. 7).			
	Record types include correspondence and web sites.			
	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 (Accommodation and Real Estate Services [ARES]) will retain these records for:	FY+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	SO	nil	FR
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	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	Accommodation and real estate internet 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.			

(continued on next page)

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A SA FD

72000 CAPITAL ASSET AND PROJECT ACCOUNTING

Records relating to accounting for the cost of tangible capital assets (i.e., fixed assets) owned by Accommodation and Real Estate Services (ARES), as well as reviewing and confirming project recoveries and billings.

Tangible capital asset (TCA) accounting integrates information about ARES owned properties with the costs associated with their acquisition, disposal, improvements, furnishings, fixtures, and equipment.

Record types include correspondence, copies of agreements, letters of credit, copies of invoices, and reports.

For accounts receivable, see ARCS secondary 935-20.
For period-end financial reporting, see ARCS primary 1180.

Unless otherwise specified below, the ministry OPR (Business Services Branch) will retain these records for:

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Letters of credit with municipalities		SO	2y	DE

SO = when no longer valid

NOTE: These letters provide for guaranteed demand payments to municipalities from the provincial government's bank in the event of building project completion problems. The retention period is recommended by Banking and Cash Management Branch, Provincial Treasury, which maintains the master files of these records.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
72000	<u>CAPITAL ASSET AND PROJECT ACCOUNTING</u> (continued)			
-03	TCA city reports	FY+9y	10y	DE
	20y = The retention period is based on two standard five-year lease terms and provides sufficient time for analysis and forecasting.			
	NOTE: These annual reports provide a year-end summary of the asset accounting information classified under secondaries -20 and -30.			
-20	Building asset accounting files (arrange by building ["B"] number)	SO	10y	DE
	SO = when building is sold or demolished and, if leased back, when no longer required for reference purposes			
	10y = The retention period is based on two standard five-year lease terms.			
-30	Land asset accounting files (arrange by land number)	SO	10y	DE
	SO = when land is sold and, if leased back, when no longer required for reference purposes			
	10y = The retention period is based on two standard five-year lease terms.			
-40	Non-ministry cost recovery accounting files (arrange by agreement)	SO	7y	DE
	SO = upon expiry of agreement			
	7y = The retention period is consistent with the ARCS retention period for financial accounting records, and ensures that records required for Goods and Services Tax (GST) audits are retained for the six-year records retention requirements under the <i>Excise Tax Act</i> (RSC 1985, c. E-15, s. 286[3]).			

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
72000	<u>CAPITAL ASSET AND PROJECT ACCOUNTING</u> (continued)			
-50	Project accounting files (arrange by project number)	SO	7y	DE
	SO = upon the end of the fiscal year in which the project is completed or closed, and if applicable, upon completion of audit			
	7y = The retention period is consistent with the ARCS retention period for financial accounting records.			

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A SA FD

73000 CUSTOMER SERVICES

Records relating to customer requests for accommodation and real estate services.

This primary covers the receipt, qualification, and definition of requests for advisory services, space changes, and projects over an established threshold amount (currently \$50,000). It also includes the preparation of annual customer accommodation budget forecasts and the management of customer accounts and relationships.

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

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

For customer billing records, see ARCS secondary 935-20.

For project implementation, see primaries 79300, 79400, or 79700 (whichever is relevant).

For property management and small project requests, see primaries 79700 and 79800.

For service level agreements with customers, see primary ARCS primary 146.

Unless otherwise specified below, the ministry OPR (Accommodation and Real Estate Services) will retain these records for:

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Customer accommodation budget files (commonly known as client budgets)		FY+1y	6y	DE

8y = The retention period is consistent with the retention period for budget planning and development records classified under ARCS primary 1000.

(continued on next page)

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A SA FD

73000 CUSTOMER SERVICES (continued)

DE = These records may be destroyed upon the authority of the records officer because customer budgets are summarized in demand forecasting reports under secondary 79600-02, which are fully retained by the government archives.

NOTE: These records are prepared for customers for budget and service planning purposes. They forecast customers' anticipated accommodation and related costs (e.g., Building Occupancy Charges [BOCs] and project costs) for the upcoming fiscal year.

VR	-03	Customer service request data (electronic records) (currently on @REALBC)	SO+10y	nil	DE
----	-----	---	--------	-----	----

SO = when customer vacates the property

10y = The retention period provides sufficient time for analysis and forecasting.

	-20	Customer service request files (includes correspondence and client requests) (arrange by request/project number)	SO	2y	DE
--	-----	--	----	----	----

SO = upon request completion or cancellation

NOTE: Classify significant records (e.g., agreements) for approved project requests to the appropriate project file under primaries 79300 or 79400.

NOTE: This secondary covers the receipt and qualification of requests for advisory services, space changes, and projects over an established threshold amount (currently \$50,000).

	-30	Customer relationship management files (arrange by customer)	SO	nil	DE
--	-----	---	----	-----	----

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A SA FD

73000 CUSTOMER SERVICES (continued)

NOTE: These records document the day-to-day relationship with customers, including the resolution of problems and identification of marketing opportunities. Service level agreements with customers are classified under ARCS primary 146.

-40	Customer service agreement files (includes signed accommodation proposals [APs] and forms A and B and requests for services [RFSs]) (arrange by agreement number)	SO	7y	DE
-----	---	----	----	----

SO = when customer vacates the property

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

NOTE: These files contain customer agreements approving the implementation of space change and projects over an established threshold amount (currently \$50,000). Since 2007, the project files under primaries 79300 and 79400 contain the complete record of customer-related agreements. Prior to 2007, this secondary was reserved for those agreements.

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A SA FD

75000 MASTER SERVICE AGREEMENT MANAGEMENT

Records relating to the service provider's compliance with the Master Service Agreement (MSA) for property management and project delivery services and other performance expectations for providing these services.

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

For invoices from the service provider, see ARCS secondary 925-20.
For MSA tendering and other procurement records, see ARCS primary 1070.

For project delivery services, see primary 79700.
For property management services, see primary 79800.

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

SO 7y DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		FY+1y	nil	DE
-02	Master Service Agreement (MSA) and amendments		SO	7y	FR

VR

FR = The government archives will fully retain the MSA contract and amendments because they document the provincial government's partnership with a private company for the provision of property management and project delivery services.

NOTE: This secondary includes the original contract and indemnities, as well as changes requested by the service provider or the government over the life of the contract.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
75000	<u>MASTER SERVICE AGREEMENT MANAGEMENT</u> (continued)			
-20	Master Service Agreement contract management files (includes correspondence, request for proposal, successful proposal, contract negotiation documents, and contract monitoring and contract relationship documents [e.g., progress and status reports and issue resolution records])	SO	7y	DE

DE = These records may be destroyed upon the authority of the records officer because significant requirements are adequately documented in the MSA contract and amendments (secondary 75000-02) and executive briefing notes and reports (special schedule 102906).

NOTE: This secondary covers records relating to the MSA award, negotiation, and performance.

SO = upon expiry or termination of MSA and all extensions

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

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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A SA FD

76000 PORTFOLIO MANAGEMENT - GENERAL

Records relating to the management of the full complement of owned and leased properties entrusted to Accommodation and Real Estate Services (ARES) not shown elsewhere in the primary block. This involves maintaining an optimal mix of properties and maximizing the physical, functional, and financial performance of the portfolio.

This primary covers the portfolio management of specific owned properties; authorization of major asset maintenance (MAM) budgets; accommodation supply planning; and projects that involve cross-portfolio analysis.

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

For accommodation demand planning, see primary 79600.

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

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Annual MAM budget authorization files		FY+9y	nil	DE

10y = The retention period provides sufficient time for analysis and forecasting.

NOTE: These records authorize the implementation of budgeted projects for the upcoming fiscal year. For the completion of MAM projects, see secondary 79700-20.

-03	Regional strategic accommodation plans		SO	nil	FR
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76000 PORTFOLIO MANAGEMENT - GENERAL (continued)

NOTE: This secondary covers projects that do not relate to a specific property (e.g., accommodation supply planning and comparison of operations and maintenance costs across the portfolio of properties).

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A SA FD

76200 PORTFOLIO MANAGEMENT - EMERGENCY MANAGEMENT

Records relating to the provision of emergency management services for properties owned by Accommodation and Real Estate Services (ARES), as well as for ARES building projects delivered by the private sector.

This includes developing emergency response and fire plans for owned properties; monitoring the health and safety of owned and leased buildings; and performing International Organization for Standardization ISO 14001 emergency response audits on construction projects not covered by the Master Service Agreement (MSA).

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

For emergency response, disaster, and business continuity planning for ARES (i.e., the corporate entity), see ARCS primary 275.
 For the ISO 14001 Environmental Management System implemented by ARES, see primary 76300.
 For the occupational health and safety of ARES employees, see ARCS primary 1560.
 For the MSA, see primary 75000.

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

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Portfolio health and safety analysis files		SO	nil	DE

NOTE: The purpose of these records is to review, analyze, and report on existing or potential health and safety problems in owned and leased properties. Problems in leased buildings are reported to the property management service provider (currently WSI) and the department managing the MSA with the service provider (i.e., Contract Management), and are classified under secondary 79700-20.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76200	<u>PORTFOLIO MANAGEMENT - EMERGENCY MANAGEMENT</u> (continued)			
	Problems in owned buildings are reported to the Portfolio Management department, and are classified under secondary 76000-20.			
	Records may include copies of incident, asbestos, mould and seismic reports received from the property management service provider and/or the Technical Value department, as well as workers' compensation board (WCB) incident reports received from ministries renting owned properties.			
-20	ISO 14001 emergency response audit files (arrange by project number)	SO+1y	nil	DE
	SO = upon completion of construction project and resolution of issues, and upon satisfactory completion of ISO 14001 compliance audit			
	NOTE: As part of its ISO 14001 certification, ARES is required to check that project construction contractors (not covered by the MSA) have emergency response plans and procedures for responding to environmental disasters they may inadvertently cause (e.g., chemical spills and leaks). Emergencies or disasters that occur on projects, as well as signed environmental contractor responsibility agreements are classified on the relevant major project file under secondary 79300-20.			
-30	Owned property emergency and fire plan files (includes CAD drawings, building description documentation, and emergency contact lists) (arrange by property address)	SO	nil	DE

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A SA FD

76300 PORTFOLIO MANAGEMENT - ENVIRONMENTAL/TECHNICAL

Records relating to the environmental stewardship of the portfolio of properties and the provision of technical advice on all aspects of the selection, procurement, evaluation, design, application and maintenance of various building systems, including the development of technical standards.

Environmental stewardship includes the remediation of owned contaminated properties, the administration of an Environmental Management System (EMS) consistent with International Organization for Standardization ISO14001 requirements, and the provision of green building guidance, advice, and services.

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

Unless otherwise specified below, the ministry OPR (Environmental Stewardship and Technical Value) will retain these records for:

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Green building research material and best practices (includes articles, papers, and reports) (arrange by Leadership in Energy and Environmental Design [LEED] categories)		SO	nil	DE

SO = when no longer required for reference purposes

NOTE: This secondary covers a collection of material on green building practices and initiatives in Canada and around the world, as well as the preparation of best practices summaries.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76300	<u>PORTFOLIO MANAGEMENT - ENVIRONMENTAL/TECHNICAL</u> (continued)			
-20	Building technology advice files (includes correspondence and consultants' reports) (arrange by property)	SO	7y	DE

SO = when property is sold or lease terminated

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

NOTE: These records document technical advice, which is often based on reports produced by contracted consultants. Advice is given on interior and exterior architectural elements and mechanical, electrical, lighting, security, and energy management systems. An engineer's stamp is not affixed to these records. Legal counsel have advised that there is no legal reason to keep these records.

VR	-30 Contaminated site remediation files (arrange by property)	SO	100y	DE
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SO = when property is sold

100y = Legal counsel has advised that 100 years provides a reasonable length of time to provide evidence of the condition of the property at the time it was sold.

DE = These records may be destroyed upon approval of the records officer because copies of significant contaminated site reports from these files are also classified in the relevant real estate disposal files under secondary 77000-30, which are fully retained by the government archives.

NOTE: These records document the remediation of approximately 200 contaminated highway and forestry yards owned by the Province. Records include initial site investigation reports and follow-up monitoring reports.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76300	<u>PORTFOLIO MANAGEMENT - ENVIRONMENTAL/TECHNICAL</u> (continued)			
-40	EMS administration files (arrange by activity, project, or subject, whichever is appropriate)	FY+1y	9y	DE
	11y = The retention period is based on three ISO 14001 registration cycles and provides sufficient information for ISO 14001 compliance audits.			
	NOTE: An EMS serves as the framework for managing the impact of an organization's products, services, and processes on the environment. These records document the development of EMS objectives and procedures, as well as the tools and resources to support EMS; the tracking, monitoring, and analysis of environmental targets; and internal audits for EMS compliance.			
-50	Green building services files (includes correspondence, reports, plans, and copies of briefing notes) (arrange by project, program, or subject, whichever is appropriate)	SO	7y	DE
	SO = upon provision of advice or information, or upon completion or abandonment of project, program, policy, or plan			
	7y = The retention period provides sufficient time for consultation and ensures that contract management records included in these files are retained for the six-year limitation period for commencing an action under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3).			
	NOTE: These records document advice, projects, and programs related to the integration of green building principles and practices into building requirements, as well as the development of green building objectives, goals, and strategic plans.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76300	<u>PORTFOLIO MANAGEMENT - ENVIRONMENTAL/TECHNICAL</u> (continued)			
	-60 Technical standards - customized (arrange by property)	SO	nil	DE
	SO = when property is sold and, if leased back, when no longer required for reference purposes			
	NOTE: These records are prepared for and incorporated in project-related requests for proposal (RFPs) classified under secondaries 79300-20 and 79400-20.			
VR	-65 Technical standards - general (arrange by building type or name of standard, whichever is appropriate)	SO	nil	FR
	SO = when developed and no longer required for reference purposes			
	FR = The government archives will fully retain general technical standards for their significant evidential and informational values. These files document the provincial government's standards for the design and construction of the various types of public buildings, as well as standards for ventilation system maintenance and indoor air quality (IAQ).			
	Staff will set aside one copy of the final versions of the standards when they are produced, and box them with other records for full retention.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76400	<u>PORTFOLIO MANAGEMENT - INVENTORY MANAGEMENT</u>			
	Records relating to maintaining accurate physical information about owned and leased buildings, complexes, and bare land in the portfolio.			
	Record types include correspondence, plans, drawings, and other types of records as indicated under relevant secondaries.			
	Unless otherwise specified below, the ministry OPR (Portfolio Services) will retain these records for:	FY+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	SO	nil	FR
		- OPR		
		- <u>non-OPR</u>	<u>nil</u>	<u>DE</u>
VR	-01 General			
	-02 Portfolio inventory data (currently on @REALBC)	SO+10y	nil	DE
	SO = when property is sold or lease is terminated			
	10y = The retention period provides sufficient data for research and analysis.			
	-03 Plans and drawings - heritage buildings (paper records)	SO	nil	FR
	SO = when scanned and digitized images have been verified for quality and backup has taken place			
	FR = The government archives will fully retain original paper plans and drawings for designated heritage buildings because they document public heritage buildings as they were constructed. These buildings have significant historical and architectural value.			
	NOTE: This secondary is to be used only for that special group of records already set aside that document heritage buildings. Any future heritage buildings will be documented only through records retained from secondary 76400-20			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76400	<u>PORTFOLIO MANAGEMENT - INVENTORY MANAGEMENT</u> (continued)			
	NOTE: The digitized images of these drawings and plans are classified under secondary -50.			
-04	Plans and drawings - all other properties (paper records)	SO	nil	DE
	SO = when scanned and digitized images have been verified for quality and backup has taken place			
	DE = These records may be destroyed upon approval of the records officer because plans and drawings are duplicated in the building inventory files (secondary 76400-20) that are fully retained by the government archives.			
	NOTE: The digitized images of these drawings and plans are classified under secondary -50.			
-20	Building inventory files (includes floor plans, move forms, site plans, as-built drawings, and relevant project-related documentation [e.g., accommodation proposals and requests for appropriation]) (arrange by building ["B"] number)	SO	7y	FR
	SO = when building is sold or lease is terminated			
	7y = The retention period provides sufficient time for research and consultation, and is consistent with the retention period for other property-related files in this ORCS.			
	FR = The government archives will fully retain building inventory files for their significant evidential and informational values. These files document the history of all buildings owned, leased, or managed by Accommodation and Real Estate Services. When the case files are transferred to the government archives, the program staff will also transfer an index that lists each building by its name and address.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76400	<u>PORTFOLIO MANAGEMENT - INVENTORY MANAGEMENT</u> (continued)			
	NOTE: These records document the physical aspects of buildings over time, including all changes to space and types of space.			
-30	Complex inventory files (includes site plans) (arrange by complex ["X"] number)	SO	7y	DE
	SO = when complex is sold or lease is terminated			
	7y = The retention period provides sufficient time for research and consultation, and is consistent with the retention period for other property-related files in this ORCS.			
	DE = These records may be destroyed upon approval of the records officer because they are duplicated on the building and land inventory files (secondaries -20 and -40), which are fully retained by the government archives.			
-40	Land inventory files (includes correspondence, site plans, land title records, and relevant project-related information) (arrange by land number)	SO	7y	FR
	SO = when land is sold or lease is terminated			
	7y = The retention period provides sufficient time for research and consultation, and is consistent with the retention period for other property-related files in this ORCS.			
	FR = The government archives will fully retain land inventory files for their significant evidential and informational values. These files document the history of all land owned, leased, or managed by Accommodation and Real Estate Services.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76400	<u>PORTFOLIO MANAGEMENT - INVENTORY MANAGEMENT</u> (continued)			
-50	Plans and drawings inventory (electronic records) (arrange by property number, then by coding system)	SO	nil	DE

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

DE = These records can be destroyed upon approval of the records officer because building plans are duplicated in building inventory files (secondary 76400-20) that are fully retained by the government archives.

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A SA FD

76500 PORTFOLIO MANAGEMENT - PRICING

Records relating to the pricing of leased, owned, and managed space, including the preparation of customers' building occupancy charge (BOC) rates in support of the annual customer budget process and as requested throughout the year for new and existing space.

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

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

For contracts, see ARCS secondary 1070-20.

For customer budgets, see secondary 73000-02.

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

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Annual portfolio cost recovery files (includes correspondence and reports, including property tax escalation rate reports and real estate property appraisal reports)		FY+2y	nil	DE

NOTE: These records document the preparation of customers' BOC rates for the upcoming fiscal year for inclusion in annual budgets classified under secondary 73000-02.

-03	Pricing benchmark files		SO	nil	DE
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SO = upon completion or cancellation of research, and when no longer required for reference purposes

NOTE: These records document the review and analysis of fees and charges in the marketplace to ensure government BOCs are consistent. Benchmarks addressed in these files include leasing, management fee, and labour charge rates.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76500	<u>PORTFOLIO MANAGEMENT - PRICING</u> (continued)			
-04	Pricing and customer budget data (currently on @REALBC)	SO+10y	nil	DE
	SO = upon the end of the fiscal year in which the information is provided			
	10y = The retention period provides sufficient data for reviewing trends and predicting costs.			
-20	Leased property pricing files (includes correspondence, accommodation proposals, billing history reports, property charge reports, market comparability reports, requests for appropriation (RFAs), cost sheets, and BOCs) (arrange by lease number)	SO+2y	nil	DE
	SO = when lease is terminated			
-30	Owned property pricing files (includes correspondence, accommodation proposals, billing history reports, property charge reports, market comparability reports, plans and drawings, RFAs, cost sheets, and BOCs) (arrange by city, then building number)	SO+2y	nil	DE
	SO = when the property is sold			
-40	Proposed project pricing files (arrange by project)	SO	nil	DE
	SO = upon project completion, cancellation, or abandonment, and when no longer required for reference purposes			
	NOTE: This secondary covers pricing estimates for proposed projects (e.g., new jails). If the project results in a leased or owned property, the file is reclassified to the relevant leased or owned property file under secondaries -20 and -30.			

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A SA FD

76600 PORTFOLIO MANAGEMENT - PROPERTY TAXATION

Records relating to annual property assessments and taxes, as well as the review and validation of grants-in-lieu (GIL) of property tax payments under the *Municipal Aid Act* (RSBC 1996, c. 324). Grants-in-lieu are paid to municipalities on government-occupied properties instead of property taxes.

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

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

For GIL payments and property tax notices and payments, see ARCS 925-20 maintained by the Accounts Payable Department.

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

CY+1y nil DE

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

SO nil DE

- | | | | | | |
|-----|--|------------------|-----------|------------|-----------|
| -00 | Policy and procedures | - OPR | <u>SO</u> | nil | FR |
| | | - <u>non-OPR</u> | <u>SO</u> | <u>nil</u> | <u>DE</u> |
| -01 | General | | | | |
| -02 | B.C. Assessment Authority (BCAA) requests
(includes correspondence and forms) | | SO | nil | DE |

SO = upon provision of information, and when no longer required for reference purposes

NOTE: This secondary covers BCAA requests for information about properties owned by Accommodation and Real Estate Services (ARES) (e.g., property income and expenses).

- | | | | | | |
|-----|---|--|--------|-----|----|
| -03 | GIL, property assessment, and tax roll data
(currently on @REALBC) | | SO+10y | nil | DE |
|-----|---|--|--------|-----|----|

SO = upon the end of the property assessment/taxation year

10y = The retention period provides sufficient data for reviewing trends and predicting costs.

(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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76700	<u>PORTFOLIO MANAGEMENT - SPACE OPTIMIZATION</u>			
	Records relating to evaluating customer space requests and making recommendations that optimize the use of available space within the portfolio or the marketplace.			
	Record types include correspondence, accommodation proposals (APs), move forms, requests for appropriation (RFAs), drawings, lease research and analysis documents, cost analyses and pricing quotations, reports.			
	Unless otherwise specified below, the ministry OPR (Planning and Inventory) will retain these records for:	FY+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
		SO	nil	FR
				- <u>non-OPR</u>
		<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-20	Space supply files (arrange by city, then by property)	SO	2y	DE
	SO = upon completion or abandonment of project			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
76800	<u>PORTFOLIO MANAGEMENT - STRATA CORPORATIONS</u>				
	Records relating to strata corporations created for owned properties entrusted to Accommodation and Real Estate Services (ARES) (e.g., the Waddington Building and bare land strata [e.g., Dease Lake]). The <i>Strata Property Act</i> (SBC 1998, c. 43, s. 35]) and <i>Strata Property Regulation</i> (B.C. Reg. 43/2000, s. 4.1) provide for the types of records strata corporations must retain and their minimum retention periods.				
	Record types include correspondence, lists, contracts, insurance policies, manuals, drawings, warranties, financial records, plans, legal documents, and other types of records as indicated under relevant secondaries.				
	Unless otherwise specified below, the ministry OPR (Portfolio Management) will retain these records for:		FY+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	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Strata corporation contact lists and laws (consists of current lists of owners, mortgagees, tenants, assignment of voting or other rights by landlords to tenants, and current copies of the <i>Strata Property Act</i> , regulations, and strata corporation bylaws and rules)		SO	nil	DE
	SO = when replaced by new version as stipulated under <i>Strata Property Regulation</i> (s. 4.1[6])				
-03	Strata corporation contracts and insurance policies		SO	7y	DE
	SO = upon termination or expiry of contract or policy				
	7y = The retention period is based on the six-year retention period for contracts and insurance policies under the <i>Strata Property Regulation</i> (ss. 4.1[4] and 4.1[7][b]).				
-04	Strata corporation routine correspondence		FY+2y	nil	DE

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76800	<u>PORTFOLIO MANAGEMENT - STRATA CORPORATIONS</u> (continued)			
	3y = The retention period is based on the two-year retention period for strata corporation correspondence under the <i>Strata Property Regulation</i> (s. 4.1[5]).			
	NOTE: These records consist of routine correspondence sent or received by strata corporations and councils. Significant correspondence (e.g., relating to contracts and insurance, financial matters, or plans and legal matters) are classified under the relevant subject secondary (e.g., -03, -07, and -08).			
-05	Strata corporation equipment manuals and drawings (includes manuals, schematic drawings, operating instructions, service guides, manufacturers' documentation and other similar information respecting the construction, installation, operation, maintenance, repair and servicing of common property or assets)	SO	nil	DE
	OPR = Service provider on behalf of ARES			
	SO = upon disposal or replacement of equipment as stipulated under <i>Strata Property Regulation</i> (s. 4.1[7][c])			
	NOTE: For administrative convenience, the service provider may classify these records under secondary 79800-04.			
-06	Strata corporation equipment warranties	SO	nil	DE
	OPR = Service provider on behalf of ARES			
	SO = upon disposal or replacement of related equipment, or upon expiry of warranty coverage, whichever comes first as stipulated under <i>Strata Property Regulation</i> (s. 4.1[7][d])			
	NOTE: For administrative convenience, the service provider may classify these records under secondary 79800-04.			

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
76800	<u>PORTFOLIO MANAGEMENT - STRATA CORPORATIONS</u> (continued)			
-07	Strata corporation financial records (includes minutes of annual and special general meetings and council meetings, results of votes, books of account, including invoices for money received and spent, waivers and consents, budgets, financial statements, bank statements, cancelled cheques, income tax returns, certificates of deposit, and information certificates)	FY+1y	6y	DE

OPR = Business Services Branch

8y = The retention period is based on the six-year retention period for strata corporation financial records under *Strata Property Regulation* (ss. 4.1[3]) and 4.1[7][e]), and is consistent with the retention period for financial records covered by ARCS section 4.

-08	Strata corporation plans and legal documents (includes registered strata plans and amendments, resolutions that involve changes to common property, arbitrators' or judges' decisions, and legal opinions; and the following records obtained from owner developers: plans and plan amendments required to obtain building permits, plans showing the actual location of pipes, wires, cables, chutes, ducts, etc. for providing systems or services, disclosure statements, and contact lists of all contractors, subcontractors, and individuals who supplied labour or materials to the project)	SO	7y	DE
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SO = upon dissolution of strata corporation

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

NOTE: The *Strata Property Regulation* (ss. 4.1[2]) and 4.1[7][a]) provide that these records must be permanently retained. The "SO" statement interprets this as "upon dissolution of strata corporation". If the Province sells its interest in an existing strata, the related records that are held on behalf of the strata corporation by the Province should be retained by the strata corporation.

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A SA FD

77000 REAL ESTATE SERVICES

Records relating to the provision of real estate services, including real estate acquisition and disposal, annual property appraisals, and projects involving major real estate assets (e.g., Riverview), minor land deals (e.g., rights-of-way), and real estate services to voluntary customers (e.g., school boards).

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

For customer budgets, see secondary 73000-02.
For property assessment appeals, see secondary 76600-20.

Unless otherwise specified below, the ministry OPR (Real Estate Services Branch) will retain these records for:

SO 7y DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		FY+1y	nil	DE
-02	Appraisal cycle files (includes correspondence, purchase orders for appraisers' services, bound appraisal reports, reports [e.g., building occupancy charges and property prices reports], site plans, and relevant land title documents) (arrange by year, then property number)		SO	nil	DE

SO = upon expiry of two appraisal cycles

NOTE: These records document annual appraisals of approximately one-fifth of owned properties in support of the annual customer budget process. (Each property is appraised approximately every five years). Expressions of interest to establish an eligibility list of appraisers, as well as the roster of qualified appraisers are classified under ARCS primary 1070.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
77000	<u>REAL ESTATE SERVICES</u> (continued)			
-03	Real estate project status tracking data (currently on a Microsoft Access database)	FY+4y	nil	DE
	5y = The retention period provides sufficient time for review and analysis.			
	NOTE: Because this is a simple database, an information system overview has not been created.			
-04	Routine real estate inquiries	SO	nil	DE
	NOTE: This secondary covers general inquiries from the public, but not inquiries relating to real estate offered for sale. Those inquiries are classified in the relevant real estate disposal file under secondary -30.			
-05	Surplus school reporting data (currently on a Microsoft Access database)	FY+4y	nil	DE
	5y = The retention period provides sufficient time for review and analysis.			
	NOTE: These records document schools identified by school districts as surplus to educational needs. Before offering the schools for sale to the private sector, school districts first report the schools to the Province to ensure surplus schools are not required for public use at the provincial level. Related projects are classified under secondary -40.			
	NOTE: Because this is a simple database, an information system overview has not been created.			

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	<u>A</u>	<u>SA</u>	<u>FD</u>
77000 <u>REAL ESTATE SERVICES</u> (continued)			
-20 Major real estate project files (includes advisory committee meeting minutes and reports, land use and technical studies, archaeological and environmental reports, communications notices, correspondence with First Nations and all levels of government, landscape plans and reports, media reports, expressions of interest documents, contracts, site plans, and surveys) (arrange by project, then by activity)	SO	7y	FR

SO = upon project completion or abandonment

FR = The government archives will fully retain major real estate project files for their significant evidential and informational values. These records document planning activities related to the reuse or disposal of major parcels of land owned by the provincial government, as well as long-term effects on communities in the province.

NOTE: Examples include the Riverview, Willingdon, Jericho Hill School, and Dogwood Lodge properties.

-25 Minor real estate services files (includes correspondence and land title records) (arrange by project)	SO	7y	DE
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SO = upon completion or abandonment of project

NOTE: This secondary covers the execution of minor real estate transactions (e.g., rights-of-way and sewer lines through government property), which are also filed with the land title office.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
77000	<u>REAL ESTATE SERVICES</u> (continued)			
-30	Real estate acquisition and disposal project files (includes correspondence, accommodation proposals(APs), appraisal reports, contamination reports, rezoning applications, land and services reports, marketing plans and reports, occupant/tenant history and agreements, sales notification letters to First Nations and municipalities, realtor listings, property charges, seismic reports, offers of purchase or sale, conditional and final sales agreements, and Requests for Appropriations [RFAs]) (arrange by city, then project number)	SO	7y	FR
	SO = when property is sold; or upon abandonment of acquisition project			
	FR = The government archives will fully retain property acquisition and disposal files for their significant evidential and informational values. These records are the most comprehensive source of information on owned properties entrusted to Accommodation and Real Estate Services.			
-40	Voluntary government customer real estate projects (includes correspondence, reports, meeting notes, plans, drawings, and copies of ministerial orders and memoranda of understanding) (arrange by project)	SO	7y	DE
	SO = upon completion or abandonment of project			
	DE = These records document the involvement of Accommodation and Real Estate Services in the disposal of the real estate assets of agencies outside the provincial government (e.g., Provincial Capital Commission and school boards).			

(continued on next page)

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A SA FD

77000 REAL ESTATE SERVICES (continued)

7y = The retention period provides sufficient time for research and consultation and ensures that agreements or contracts included in these files are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

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A SA FD

79000 WORK ACCOMMODATION SERVICES - GENERAL

Records relating to the implementation of accommodation solutions and services previously defined and recommended by customer and portfolio services staff, not shown elsewhere in this primary block.

Record types include correspondence.

For defining and recommending accommodation solutions and services, see secondaries 73000-20 and 76000-20.

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

FY+1y nil DE

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

SO nil DE

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

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A SA FD

79200 WORK ACCOMMODATION SERVICES - LEASING (continued)

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

NOTE: The purpose of this secondary is to ensure that agreements with indemnities granted to the Province by landlords and private sector tenants are retained until they expire. Copies of the agreements are also filed on the lease and corporate case files (secondaries -20 and -30) in order to keep those files intact.

-20 Lease case files SO+2y 8y DE
 (arrange by lease number)

SO = upon termination of lease

10y = The retention period is based on two standard five-year lease terms. It provides sufficient time for consultation in the event the releasing of a property is being considered.

DE = Lease case files can be destroyed upon approval of the records officer because leased buildings are sufficiently documented in building case files (secondary 76400-20) that are fully retained by the government archives.

-30 Private sector corporate let case files SO+2y 5y DE
 (arrange by corporate let number)

SO = upon termination of let

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

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A SA FD

79300 WORK ACCOMMODATION SERVICES - MAJOR PROJECTS

Records relating to the planning, implementation, completion, and close-out of large-scale, complex design and construction projects (currently valued over \$2 million), including the provision of advice to customers on their major design and construction projects and participation in cross-government initiatives.

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

For cross-government initiatives, see ARCS primary 400.
 For defining and qualifying projects in leased and owned properties, see secondaries 73000-20 and 76000-20 respectively.
 For drawings and plans, see secondary 76400-50.
 For equipment operating manuals, see secondary 79800-04.
 For medium projects, see secondary 79400-20.
 For small projects, see secondary 79700-20.

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

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Major project data (electronic records) (currently on @REALBC)		SO+10y	nil	DE

SO = when project is closed

10y = The retention period provides sufficient data for research and analysis.

(continued on next page)

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			<u>A</u>	<u>SA</u>	<u>FD</u>
79300		<u>WORK ACCOMMODATION SERVICES - MAJOR PROJECTS</u> (continued)			
VR	-20	Major project and advice files (covers projects currently valued over approximately \$2 million) (includes correspondence, project charters, meeting agendas and minutes, agreements and approval documents, planning studies, plans and drawings, expressions of interest documents [e.g., requests for proposal], signed contracts, signed environmental contractor responsibility agreements, change orders, status reports, purchase orders, and progress draws and invoices) (arrange by project)	SO	7y	DE

SO = when property is demolished

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

DE = Major project and advice files will be destroyed because they mostly document details of the construction process that do not have sufficient value to justify retention in the government archives. Significant activities are sufficiently documented in building case files, client budget records and business plans, and executive records.

NOTE: The rationale for the "SO" statement is the risk of negligence actions remain as long as the building exists.

NOTE: This secondary covers major design and construction projects, including planning records related to potential major projects that have not proceeded to the construction phase. It also covers advice given to customers on their major design and construction projects (e.g., Ministry of Education on school seismic upgrading priorities and issues and health authorities on the design and construction of hospitals and other care facilities).

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A SA FD

79300 WORK ACCOMMODATION SERVICES - MAJOR PROJECTS
(continued)

NOTE: Major projects involve the formation of business cases, project plans, project teams, and procurement strategies; development of detailed scope, schedule, and budget; preparation of project charters and risk management and communications plans; securing approvals; engagement of private sector resources; and overall project management.

Advisory services many include drafting requests for proposals, screening proposals and recommending proponents, drafting contracts, representing customers at public hearings, and providing project management advice.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
79400	<u>WORK ACCOMMODATION SERVICES - MEDIUM PROJECTS</u>		
	(continued)		
-20	Medium project files	SO	7y DE
	(includes project charters, meeting agendas and minutes, agreements and approval documents, plans and drawings, expressions of interest documents [e.g., requests for proposal], and signed contracts) (arrange by project)		

SO = upon completion of project close-out phase, or upon project cancellation

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

NOTE: These records document the development of the detailed project scope, schedule, and budget (which may involve the services of private sector consultants); project completion oversight, including site visits and attendance at significant meetings; and project close-out activities, including final inspections and project sign-offs.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
79500	<u>WORK ACCOMMODATION SERVICES - PARKING</u>				
	Records relating to processing customer parking stall requests. This involves allocating parking stalls in government-owned and licensed (i.e., private) parking lots, negotiating parking license agreements with landlords and private customers, and maintaining a parking stall inventory.				
	Record types include correspondence, parking accommodation proposals, license agreements with landlords, private parking agreements, drawings, plans, and reports.				
	Unless otherwise specified below, the ministry OPR (Leasing Services) will retain these records for:		FY+1y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	<u>SO</u>	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Parking issues management files (includes electronic mail correspondence)				
	NOTE: Significant correspondence related to licensed parking are reclassified under secondary -30.				
	Parking issues related to a lease are classified in the relevant lease case file under secondary 79200-20.				
VR	-03 Parking management data (electronic records) (currently on @REALBC)		SO+10y	nil	DE
	SO = upon termination of agreement with owner of licensed parking lot or when government-owned lot is sold; and in the case of parking stalls, when the customer vacates the stall				
	10y = The retention period is consistent with the retention period for leasing and inventory data.				

(continued on next page)

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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.

		<u>A</u>	<u>SA</u>	<u>FD</u>
79500	<u>WORK ACCOMMODATION SERVICES - PARKING</u> (continued)			
-20	Government-owned parking files (arrange by municipality, property number, and stall)	SO+2y	5y	DE
	SO = when stall is assigned to new customer			
	7y = The retention period is consistent with the retention period for the parking files classified under secondary - 30.			
-30	Licensed parking files (arrange by license agreement number)	SO+2y	5y	DE
	SO = upon termination of agreement and all renewals to the agreement			
	7y = The retention period satisfies the six-year limitation period for commencing an action under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3).			
	NOTE: These files contain license agreements with landlords, parking agreements with private customers, as well as significant correspondence reclassified from secondary -02.			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

79600 WORK ACCOMMODATION SERVICES - PLANNING

Records relating to the provision of accommodation demand forecasting and strategic accommodation planning services, as well as the provision of specific interior architecture solutions. This includes the development of generic and customized space standards, customer-specific designer handbooks, and space requirement templates for requests for proposal (RFPs).

Record types include correspondence, discussion papers, briefing notes, plans, manuals, handbooks, templates, reports, and contracts.

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

FY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	<u>SO</u>	nil	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Final demand forecasting reports		SO	nil	FR

FR = The government archives will fully retain approved, final demand forecasting reports for their significant evidential and informational value. These records document the accommodation needs and space requirements of ministries and include (in the appendix) current client accommodation budget information and profiles (including photographs and floor plans) of buildings currently occupied by ministries.

Staff will set aside one copy of the final versions of the initial report and future updates when they are produced, and box them with other records for full retention.

(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>
79600	<u>WORK ACCOMMODATION SERVICES - PLANNING</u> (continued)				

VR	-03	Final planning standards, handbooks, and templates	SO	nil	FR
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FR = The government archives will fully retain approved, final space standards, designer handbooks, and request for proposal (RFP) templates because they document government standards, guidelines, and requirements for the design of public buildings.

Staff will set aside one copy of the final versions of the standards, handbooks, and templates when they are produced, and box them with other records for full retention.

NOTE: This secondary covers approved, final generic standards (e.g., *Government Office Space Standards [GOSS]* and *Designers Handbook*), approved, final designer handbooks for specific ministries, and approved RFP master templates. The development of these standards, guidelines, and templates is covered by secondary -30.

	-20	Planning project files (arrange by project and coding system)	SO	7y	DE
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SO = when project is completed, closed, or cancelled

7y = The retention period provides sufficient time for research and consultation and ensures that contract management records included in these files are retained for the six-year limitation period for commencing an action under the *Limitation Act* (RSBC 1996, c. 266, s. 3).

DE = These records may be destroyed upon approval of the records officer because approved, final demand planning reports are fully retained by the government archives under secondary -02.

(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>
79600	<u>WORK ACCOMMODATION SERVICES - PLANNING</u> (continued)			
	NOTE: Projects involve the development of strategic accommodation plans, demand forecasts, needs analyses, and feasibility studies.			
-30	Planning standard, handbook, template development (arrange by title or ministry, whichever is appropriate)	SO	nil	DE
	SO = upon approval and release and when no longer required for reference purposes			
	DE = These records may be destroyed upon approval of the records officer because approved, final standards, handbooks, and templates are fully retained by the government archives under secondary -03.			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

79700 WORK ACCOMMODATION SERVICES - PROJECT DELIVERY

Records relating to the implementation and completion of building projects up to an established threshold amount (currently up to \$2 million). This includes tenant improvement, major asset maintenance (MAM), and structural and environmental remediation projects.

Record types include correspondence, project charters, meeting agendas and minutes, agreements and approval documents, copies of plans and drawings, expressions of interest documents (e.g., requests for proposal), signed contracts, change orders, status reports, purchase orders, and progress draws and invoices.

NOTE: Although the project delivery services covered by this primary are performed by the private sector, the records belong to the government. This primary provides for the classification, as well as the retention and disposition of government records that are maintained by the service provider while providing these services on behalf of the provincial government.

For MAM project authorization, see secondary 76000-02.
 For plans and drawings, see 76400-50.
 For medium and space change project oversight, see primary 79400.

Unless otherwise specified below, the ministry OPR (Workplace Solutions Inc. [WSI] on behalf of ARES) will retain these records for: FY+1y nil DE

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

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

DE = These records may be destroyed upon the authority of the records officer because they are adequately documented in technical and design standards (secondaries 76300-65 and 79600-03) and in the Master Service Agreement contract and amendments (secondary 75000-02), which are fully retained by the government archives.

-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>
79700	<u>WORK ACCOMMODATION SERVICES - PROJECT DELIVERY</u> (continued)			
-20	Project delivery files (covers all projects except for hazardous substance testing and remediation projects, which are classified under -30) (arrange by project number)	SO	7y	DE
	SO = when property is sold or lease is terminated and upon expiry of applicable warranties			
	7y = The retention period is based on the six-year limitation period for commencing an action under the <i>Limitation Act</i> (RSBC 1996, c. 266, s. 3).			
VR	-30 Owned property hazardous substance project files (arrange by property)	SO	100y	DE
	SO = when property is sold			
	100y = Legal counsel has advised that 100 years provides a reasonable length of time to provide evidence of the condition of the property at the time it was sold.			
	NOTE: Examples of hazardous substances covered by this secondary include asbestos, mould, and radon gas.			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

79800 WORK ACCOMMODATION SERVICES - PROPERTY MANAGEMENT

Records relating to day-to-day property management services such as cleaning, security, ground maintenance and landscaping, snow removal, and mechanical, electrical, elevator, plumbing and utility system repair and maintenance.

This includes routine building maintenance and repairs; equipment inspection and maintenance; indoor air quality testing; and incident reporting.

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

NOTE: Although property management services covered by this primary are performed by the private sector, the records belong to the government. This primary provides for the classification, as well as the retention and disposition of government records that are maintained by the service provider while providing these services on behalf of the provincial government.

Unless otherwise specified below, the ministry OPR (Workplace Solutions Inc. [WSI] on behalf of ARES) will retain these records for: FY+1y nil DE

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

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

DE = These records may be destroyed upon the authority of the records officer because they are adequately documented in technical and design standards (secondaries 76300-65 and 79600-03) and in the Master Service Agreement contract and amendments (secondary 75000-02), which are fully retained by the government archives.

-01	General				
-02	Equipment maintenance - ventilation systems (includes logs and reports)		SO	7y	DE

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
79800	<u>WORK ACCOMMODATION SERVICES - PROPERTY MANAGEMENT</u> (continued)			
	SO = upon disposal or replacement of related equipment, or when property is no longer leased or owned (whichever is earlier)			
	7y = The retention period is based on the seven-year retention period stipulated for ventilation system maintenance records in the <i>ARES Mandatory Preventative Maintenance Standard</i> (which is classified under secondary 76300-65).			
-03	Equipment maintenance - all other equipment (includes logs and reports)	SO	3y	DE
	SO = upon disposal or replacement of related equipment, or when property is no longer leased or owned (whichever is relevant)			
	3y = The retention period provides sufficient time for consultation.			
	NOTE: <i>Occupational Health and Safety Regulation</i> (B.C. Reg. 296/97, part 4.9) requires that "detailed reports of inspection, maintenance, repairs and modifications must be kept for the duration of the service life of the machine or equipment".			
-04	Equipment operating manuals and warranties	SO	nil	DE
	SO = upon disposal or replacement of related equipment, or when property is no longer leased or owned and warranty coverage has expired			
	NOTE: For administrative convenience, strata corporation equipment manuals, drawings, and warranties maintained by the service provider may be classified under this secondary rather than under secondaries 76800-05 and -06.			
-05	Operations and maintenance (O and M) records (includes correspondence and work orders)	FY+2y	nil	DE

(continued on next page)

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INFORMATION SYSTEM OVERVIEW SECTION

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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.

INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

Accommodation and Real Estate Services (ARES)
Information Systems

System Title

@REALBC

Purpose

The purpose of @REALBC is to support ARES' business functions associated with its customers, leases, projects, and real estate. (This system replaced Requests, Agreements, and Projects [RAP] in August 2008).

Information Content

@REALBC contains information on owned and leased properties entrusted to ARES, customer requests and projects (e.g., moves, leases, parking, renovations in existing space, and construction of new space), service and project pricing, and customer building occupancy charges and other customer accommodation budgeting information, including property assessment and property tax amounts for owned buildings.

Inputs, Processes, and Outputs

Inputs

@REALBC inputs consist of customer requests and building occupancy, lease, and project information entered by staff; data loads of current year and revised property assessment information from B.C. Assessment Authority; data loads of current year property tax information from Ministry of Community Services; and summary level property management and project delivery financial information transmitted from service provider's computer application (i.e., RealSuite).

Processes

@REALBC interfaces with the Corporate Accounting System (CAS), service provider's computer application, and Oracle Financials for payment processing and project cost tracking; and calculates customer budget information (e.g., building occupancy charges and project costs), payments to landlords, price estimates for projects and services, and grants-in-lieu (GIL) of property tax payments.

Outputs

@REALBC outputs consist of accommodation proposals, lease cost sheets, customer budgets, invoices, landlord payment data transmitted to CAS, 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.

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.

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.	Secondary Title
73000-03	Customer service request data
76400-02	Portfolio inventory data
76500-04	Pricing and customer budget data
76600-03	GIL, property assessment and tax roll data
79200-02	Lease and let management data
79300-02	Major project data
79400-02	Medium project data
79500-03	Parking management data

Inputs

Secondary No.	Secondary Title
73000-20	Customer service request files
76000-20	Owned property portfolio stewardship files
76400-20	Building inventory files
76400-30	Complex inventory files
76400-40	Land inventory files
76600-20	Property assessment appeal files
77000-02	Appraisal cycle files
79200-20	Lease case files
79200-30	Private sector corporate let case files
79300-20	Major design and construction project files
79400-20	Medium project files
79500-20	Government-owned parking files
79500-30	Licensed parking files
79700-20	Project delivery files
79800-05	Operations and maintenance (O and M) records

Outputs

Secondary No.	Secondary Title
73000-40	Customer service agreement files
76000-20	Owned property portfolio stewardship files
76500-02	Annual portfolio cost recovery files
76500-20	Leased property pricing files
76500-30	Owned property pricing files
76600-04	GIL payment validation files
76600-20	Property assessment appeal files
76700-20	Space supply files
77000-02	Appraisal cycle files
79200-20	Lease case files
79200-30	Private sector corporate let case files
79300-20	Major design and construction project files

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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79400-20	Medium project files
79500-20	Government-owned parking files
79500-30	Licensed parking files
79600-20	Planning project 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 CAS, see the *Office of the Comptroller General ORCS* (schedule 88096).

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

Accommodation and Real Estate Services (ARES)
Information Systems

System Title

Requests, Agreements, and Projects (RAP)

Purpose

The purpose of RAP is to support ARES' business functions associated with its customers, leases, projects, and real estate. (This system was replaced by @REALBC in August 2008, but RAP still retains the pre-August 2008 data).

Information Content

RAP contains pre-August 2008 information on owned and leased properties entrusted to ARES, customer requests and projects (e.g., moves, leases, parking, renovations in existing space, and construction of new space), service and project pricing, and customer building occupancy charges and other customer accommodation budgeting information, including property assessment and property tax amounts for owned buildings.

Inputs, Processes, and Outputs**Inputs**

RAP inputs consist of pre-August 2008 customer requests and building occupancy, lease, and project information entered by staff; data loads of current year and revised property assessment information from B.C. Assessment Authority; data loads of current year property tax information from Ministry of Community Services; and summary level property management and project delivery financial information transmitted from service provider's computer application (i.e., RealSuite).

Processes

RAP interfaced with the Corporate Accounting System (CAS), service provider's computer application, and Oracle Financials for payment processing and project cost tracking; and calculated customer budget information (e.g., building occupancy charges and project costs), payments to landlords, price estimates for projects and services, and grants-in-lieu (GIL) of property tax payments.

Outputs

RAP outputs consisted of pre-August 2008 accommodation proposals, lease cost sheets, customer budgets, invoices, landlord payment data transmitted to CAS, 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.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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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.	Secondary Title
73000-03	Customer service request data
76400-02	Portfolio inventory data
76500-04	Pricing and customer budget data
76600-03	GIL, property assessment and tax roll data
79200-02	Lease and let management data
79300-02	Major project data
79400-02	Medium project data
79500-03	Parking management data

Inputs

Secondary No.	Secondary Title
73000-20	Customer service request files
76000-20	Owned property portfolio stewardship files
76400-20	Building inventory files
76400-30	Complex inventory files
76400-40	Land inventory files
76600-20	Property assessment appeal files
77000-02	Appraisal cycle files
79200-20	Lease case files
79200-30	Private sector corporate let case files
79300-20	Major design and construction project files
79400-20	Medium project files
79500-20	Government-owned parking files
79500-30	Licensed parking files
79700-20	Project delivery files
79800-05	Operations and maintenance (O and M) records

Outputs

Secondary No.	Secondary Title
73000-40	Customer service agreement files
76000-20	Owned property portfolio stewardship files
76500-02	Annual portfolio cost recovery files
76500-20	Leased property pricing files
76500-30	Owned property pricing files
76600-04	GIL payment validation files
76600-20	Property assessment appeal files
76700-20	Space supply files
77000-02	Appraisal cycle files
79200-20	Lease case files
79200-30	Private sector corporate let case files
79300-20	Major design and construction project files

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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79400-20	Medium project files
79500-20	Government-owned parking files
79500-30	Licensed parking files
79600-20	Planning project 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 CAS, see the *Office of the Comptroller General ORCS* (schedule 88096).

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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SUBJECT HEADINGS

PRIMARY NUMBERS

ACCOMMODATION AND REAL ESTATE

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.

(continued on next page)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SUBJECT HEADINGS

PRIMARY NUMBERS

- A -

ACCOMMODATION

- demand 79600
- plans 76000 and 79600
- supply 76700

ACCOUNTING

- project 72000
- tangible capital asset 72000

ACQUISITION

- of real estate 77000

ADVICE

- building technology 76300
- green building 76300
- school seismic upgrading 79300
- voluntary customer real estate asset disposal 77000

AGREEMENTS

- with customers 73000, 79300, and 79400

ANNUAL

- MAM budget authorization 76000
- property appraisals 77000

APPRAISALS

- property 77000

ASBESTOS

- testing and remediation 79700

ASSET

- accounting 72000

AUDITS

- ISO 14001 76200 and 76300

- B -

BARE LAND

- stratas 76800

BC ASSESSMENT AUTHORITY

- requests for information 76600

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
BENCHMARKS	
- pricing	76500
BOC (See BUILDING OCCUPANCY CHARGES)	
BUDGET(S)	
- client accommodation	73000
BUILDING	
(See also PROPERTY)	
- asset accounting	72000
- files	76000 and 76400
- green	76300
- occupancy charges	73000 and 76500
- plans and drawings	76400
- repair and maintenance	76800 and 79800
- technical advice	76300
- C -	
CAPITAL	
- asset accounting	72000
CLEANING SERVICES	79800
CLIENTS (See CUSTOMERS)	
CLIMATE ACTION	
- coordination, infrastructure-related	79300
CREDIT	
- letters of	72000
COMPLEXES	
(See also PROPERTY)	
- files	76400
CONTAMINATED SITE	
- testing and remediation	76300
CONTRACT	
- Master Service Agreement	75000
CORPORATE LETS	79200
COST RECOVERY	
- customer	73000 and 76500
- project	72000

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
CUSTOMER(S)	
- agreements	73000, 79300 and 79400
- budgets	73000
- cost recovery accounting	72000
- relationship management	73000
- requests	73000
- services	73000
- D -	
DEASE LAKE	
- stratas	76800
DISPOSAL	
- of real estate	77000
DOGWOOD LODGE PROPERTY	
- reuse or disposal	77000
DRAWINGS	
- building	76400
- equipment	79800 and 76800
- E -	
EMERGENCY MANAGEMENT	
- of owned properties	76200
ENVIRONMENTAL STEWARDSHIP	76300
- contaminated sites and hazardous substance	76300
- indoor air quality testing	79800
EQUIPMENT	
- maintenance	79800
- manuals and drawings	79800 and 76800
- warranties	79800 and 76800
- F -	
FIRE PLANS	
- for owned properties	76200
FIXED ASSET	
- accounting	72000

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- G -	
GIL (See GRANTS-IN-LIEU)	
GRANTS-IN-LIEU	76600
GREEN BUILDINGS	76300
- H -	
HANDBOOKS - designer	79600
HAZARDOUS SUBSTANCE - testing and remediation	76300
HERITAGE BUILDINGS (See also BUILDINGS) - plans and drawings	76400
- I -	
OAQ (See INDOOR AIR QUALITY)	
INCIDENTS	79800
INDOOR AIR QUALITY - testing	79800
INFRASTRUCTURE - projects, major	79300
INTERNATIONAL ORGANIZATION FOR STANDARDIZATION (See ISO)	
INVENTORY - building	76400
- complexes	76400
- land	76400
- plans and drawings	76400
ISO 14001 - emergency response audits	76200
- environmental management systems	76300

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- J -	
JANITORIAL SERVICES	79800
JERICHO HILL SCHOOL PROPERTY - reuse or disposal	77000
- K -	
- L -	
LAND (See also PROPERTY) - asset accounting - files	72000 76000 and 76400
LEASING	79200
LETS, CORPORATE	79200
LETTERS OF CREDIT	72000
LICENSED PARKING	79500
- M -	
MAINTENANCE SERVICES	79800
MAJOR - asset maintenance budget authorization - asset maintenance projects - design and construction projects - infrastructure-related projects	76000 79800 79300 79300
MAM (See MAJOR ASSET MAINTENANCE)	
MANUALS - equipment	79800 and 76800
MASTER SERVICE AGREEMENT - project delivery - property management	75000 79700 79800
MEDIUM - design and construction projects	79400

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
MILL RATE INFORMATION	76600
MOULD	
- testing and remediation	76300
MOVE	
- projects	76700, 76400 and 79400
MSA (See MASTER SERVICE AGREEMENT)	
	- N -
	- O -
O AND M (See OPERATIONS AND MAINTENANCE)	
OPERATIONS AND MAINTENANCE	
- work orders	79800
	- P -
PARKING MANAGEMENT	79500
PLANNING SERVICES	79600
Plans	
- building	76400
POLICIES (See secondary -00 throughout ORCS)	
PORTFOLIO STEWARDSHIP	76000-76800
- inventory	76400
PRICING	76500
PROCEDURES (See secondary -00 throughout ORCS)	
PROJECTS	
- accounting	72000
- leasing	79200
- major	79300
- medium	79400
- move	76700, 76400 and 79400
- parking	79500

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- planning	79600
- pricing	76500
- portfolio management	76000
- real estate	77000
- service provider delivery of	79800
- small	79700
- space change	73000, 76700 and 79400
PROPERTY (See also BUILDING and LAND)	
- acquisition	77000
- appraisal cycle	77000
- assessments	76600
- disposal	77000
- incidents	79800
- management	79800
- strata corporations	76800
- taxation	76600
PROVINCIAL CAPITAL COMMISSION	
- real estate services to	77000
- Q -	
- R -	
RADON GAS	
- testing and remediation	76300
REAL ESTATE	
- services	77000
REGIONAL	
- strategic accommodation plans	76000
REPAIR AND MAINTENANCE SERVICES	79800
REPORTS	
- demand forecasting	79600
- tangible capital asset city	72000
REQUESTS	
- for services	73000
RIGHTS-OF-WAY	
- real estate transactions	77000

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
RIVERVIEW PROPERTY	
- reuse of disposal	77000
- S -	
SCHOOLS	
- capital and seismic upgrading projects	79300
- disposal advice	77000
- seismic upgrading advice	79300
- surplus reporting	77000
SEWER LINE	
- real estate transactions	77000
SLIPS AND FALLS	
- reporting	79800
SPACE	
- change projects	73000, 76700 and 79400
- demand	79600
- standards	79600
- supply	76700
STANDARDS	
- design	79600
- space	79600
- technical	76300
STRATA CORPORATIONS	76800
- T -	
TANGIBLE	
- capital asset accounting	72000
TAXATION	
- property	76600
TCA (See TANGIBLE CAPITAL ASSET)	
TECHNICAL	
- advice	76300
- standards	76300
- U -	

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<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
- V -	
VACANT LAND - stratas	76800
VENTILATION SYSTEMS - maintenance	79800
VOLUNTARY CUSTOMER - real estate services	77000
- W -	
WADDINGTON BUILDING - Strata Corporation	76800
WARRANTIES - equipment	79800 and 76800
WEB SITE	70000
WILLINGDON PROPERTY - reuse or disposal	77000
WORK ORDERS	79800
WORK PLACE - demand - services - supply	79600 79000-79600 76700
- X -	
- Y -	
- Z -	