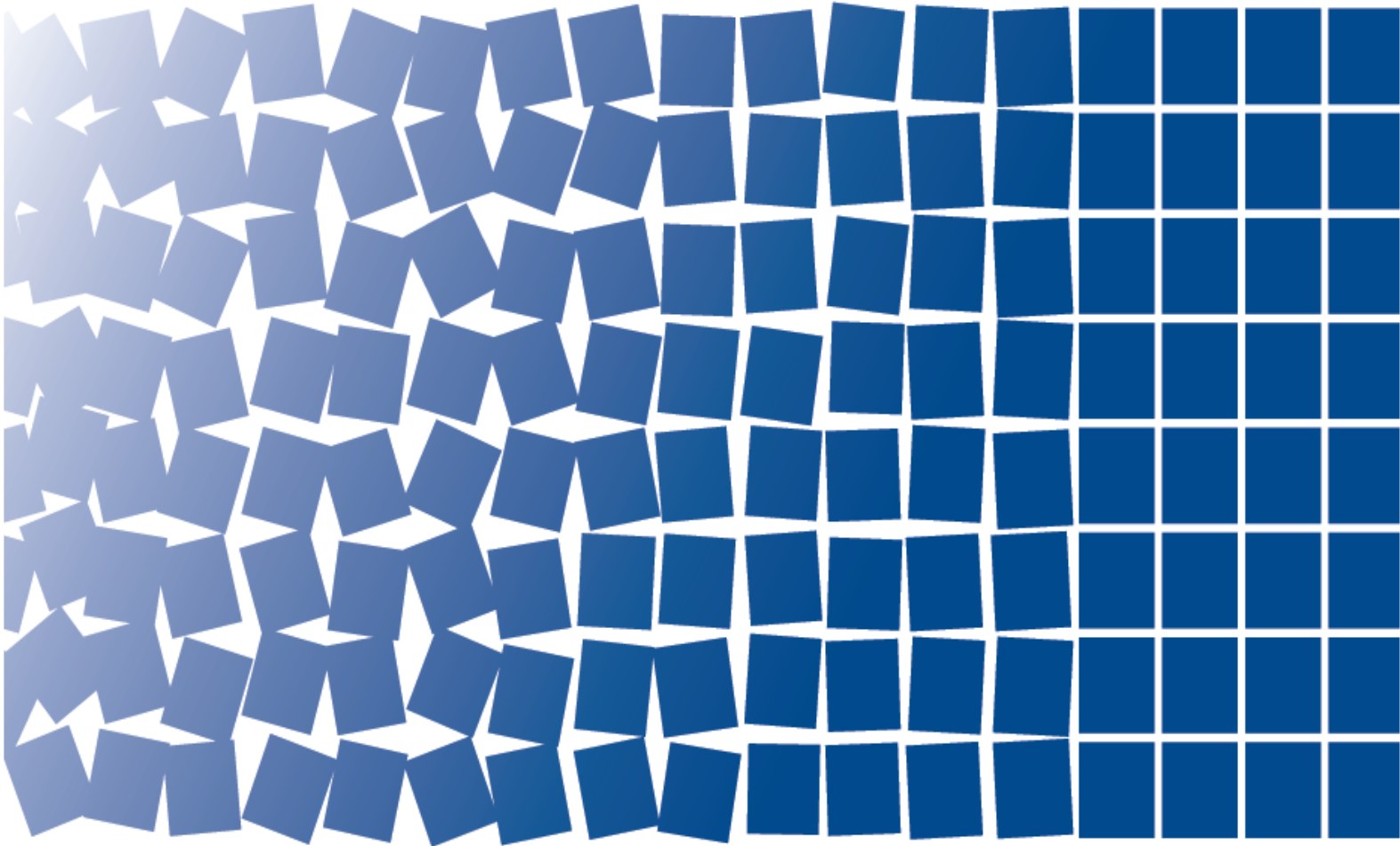


COMMUNICABLE DISEASE CONTROL SERVICES OPERATIONAL RECORDS CLASSIFICATION SYSTEM



GOVERNMENT RECORDS SERVICE

**COMMUNICABLE DISEASE
CONTROL SERVICES
OPERATIONAL RECORDS
CLASSIFICATION SYSTEM**



GOVERNMENT RECORDS SERVICE

RE: Schedule 122350 (approved 1999-07-15)
Administrative Amendment

Prepared by Mary McIntosh.

Primary 22300 Patient examination and treatment, secondaries -20 HIV antibody test counselling visit case files and -~~40~~ STD clinic patient files have the physical format qualifier "(electronic database – STDCIS)".

An amendment has been requested to change the physical format qualifier for these secondaries to "(paper and electronic records)".

The qualifier is incorrect as the database is scheduled under secondary -05. Secondaries -20 and -40 cover the patient files. The STD Control/ATEC (AIDS Testing, Education and Counselling) clinic phased out paper patient files about 10 years ago. However, there are paper files in storage that were not accounted for when the ORCS was developed. This amendment will allow us to dispose of the paper records in storage.

Since the combined active and semi-active retention period and final disposition are the same in both the original schedule and the proposed amendment, Corporate Records Management Branch (CRMB) approves the schedule change as an administrative amendment.

Signed

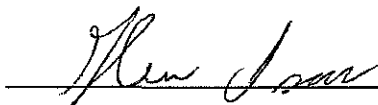


04/03/08

Marland Grove
Director, Government Records Services, CRMB

These changes have been reviewed under Authority of the Public Documents Committee to ensure that the changes are non-substantive.

Signed



(24/03/02)

Glen Isaac
Secretary, Public Documents Committee

RECORDS RETENTION AND DISPOSITION AUTHORITY

Accession No. see ORCS "Introduction" part 2.6.1 (c)

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

Title: *Communicable Disease Control Services Operational Records Classification System*

Ministry of Health and Ministry Responsible for Seniors
BC Centre for Disease Control

Description and Purpose:

The *Communicable Disease Control Services Operational Records Classification System (ORCS)* covers all operational records created, received, and maintained by Communicable Disease Control Services. These records document communicable disease surveillance, prevention and control; diagnostic and reference microbiology testing and consultation; program research and development respecting the investigation, diagnosis and control of communicable diseases and response to environmental and public health problems; the prevention and control of sexually transmitted diseases, including the Human Immunodeficiency Virus (HIV) and Acquired Immune Deficiency Syndrome (AIDS); and the prevention and control of tuberculosis.

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

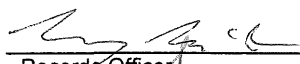
Date range: 1938/01/01 - ongoing

Physical format of records: see attached schedule

Annual accumulation: 4.8 cubic meters

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

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:



Records Officer

98/11/05

Date



Executive Director/ADM

98/11/10

Date



Deputy Minister/Corporate Executive

98/11/18

Date

THE PUBLIC DOCUMENTS COMMITTEE CONCURS:



Chair, PDC

FEB 25 1999

Date

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

APR 20 1999

Date

APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY:

JUL 15 1999

Date

OTHER STATUTORY APPROVALS:

Signature
Title:

Date

Signature
Title:

Date

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

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

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.

Rae Butcher
Records Analyst

Date 1998/10/07

This appraisal documents the recommendation for final disposition.

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

The definitions of both selective and full retention provide that unnecessary duplicates, transitory materials, and ephemera may be discarded.

John Steward
Archivist

1998/10/05
Date

Chris Noe

Director, Information and Data Management Branch

Nov. 2/98

Date

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

A

SA

FD

COMMUNICABLE DISEASE CONTROL SERVICES

Operational Records Classification System

EXECUTIVE SUMMARY

This *Operational Records Classification System (ORCS)* establishes a classification system and retention and disposition schedule for the operational records created by the B.C. Centre for Disease Control. The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. Information and Data Management Branch (IDMB) has reviewed the final dispositions to ensure that records which have residual value to government or historical value are preserved.

These records document the functions of the division, including: communicable disease surveillance, prevention and control; diagnostic and reference microbiology testing and consultation; program research and development respecting the investigation, diagnosis and control of communicable diseases and response to environmental and public health problems; the prevention and control of sexually transmitted diseases, including the Human Immunodeficiency Virus (HIV) and Acquired Immune Deficiency Syndrome (AIDS); and the prevention and control of tuberculosis.

Legislated authority for the operations of the B.C. Centre for Disease Control is provided by the *Health Act* (RSBC 1996, c. 197), *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83), *Pharmacists, Pharmacy Operations and Drug Scheduling Act* (RSBC 1996, c. 363), *Venereal Disease Act* (RSBC 1996, c. 475), and subsequent legislation governing the operational responsibilities and functions of the creating agency.

(Continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

The summary which follows describes the basic types of records and identifies their retention periods and final disposition. Please consult the manual for further information.

This *Operational Records Classification System* consists of four sections covering the following main topics:

Communicable Disease Surveillance, Prevention and Control
Laboratory Testing, Consultation and Research
Prevention and Control of Sexually Transmitted Diseases
Prevention and Control of Tuberculosis

Unless otherwise specified, records described in the ORCS will be destroyed three years after the calendar year of their creation or receipt.

CY+1y 2y DE

Throughout this ORCS, The government archives will fully retain all policy, procedure and standards files created by the office having primary responsibility for policy, procedure or standard development and approval for their evidential value. Draft and duplicate materials that hold no evidential value will be purged and discarded.

SO 5y FR

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A SA FD

Section 1

COMMUNICABLE DISEASE CONTROL SERVICES

Records relating to applied public health research; provision of public health consultation services; development and coordination of disease control policy; communicable disease surveillance; investigation of disease outbreaks; and distribution of biological products and pharmaceuticals.

20240-20	The government archives will fully retain disease control issues, studies and reports when the information is no longer current.	SO	nil	FR
20260-02	The government archives will fully retain policy circulars fourteen years after the calendar year of their creation or receipt.	CY+4y	10y	FR
20260-03	The government archives will fully retain the communicable disease manual fifteen years after new or revised standards and guidelines are issued.	SO+5y	10y	FR
20280-07	The government archives will fully retain one copy of each monthly statistical report after the calendar year of creation or receipt.	CY	nil	FR
20420-05	The government archives will fully retain Adverse Reaction System (ARS) annual statistical reports two years after the calendar year of creation or receipt.	CY+2y	nil	FR
20450-30	The government archives will fully retain immunization program implementation strategies ten years after the program is implemented.	SO+5y	5y	FR
20210-20	The government archives will selectively retain outbreak investigation case files twenty-six years after completion of the investigation final report.	SO+1y	25y	SR

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A SA FD

Section 2

PROVINCIAL LABORATORY SERVICES

Records relating to public health, diagnostic and reference microbiology testing; medical microbiology consultation; and research and development services to investigate, diagnose and control communicable diseases and respond to environmental and public health problems.

21000-02	The government archives will fully retain one copy of each annual report seven years after the calendar year of creation or receipt.	CY+2y	5y	FR
21400-50	The government archives will fully retain microbiology research articles and abstracts when obsolete or no longer required for reference purposes.	SO	nil	FR
21800-20	The government archives will fully retain disease diagnosis research and development project case files when the project is completed or abandoned.	SO	nil	FR

Section 3

SEXUALLY TRANSMITTED DISEASES/ AIDS CONTROL SERVICES

Records relating to the prevention, treatment and control of sexually transmitted diseases (STDs), including Human Immuno-deficiency Virus/Acquired Immune Deficiency Syndrome (HIV/AIDS).

22100-03	The government archives will fully retain AIDS statistical quarterly reports when the information is no longer required for reference purposes.	SO	nil	FR
22100-30	The government archives will fully retain one copy of each STD/AIDS annual report seven years after the calendar year of creation or receipt.	CY+2y	5y	FR

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		<u>A</u>	<u>SA</u>	<u>FD</u>
22520-20	The government archives will fully retain B.C. Native AIDS Awareness workshop materials two years after the workshop curricula is revised.	SO	2y	FR
22550-20	The government archives will fully retain STD/AIDS education workshop modules and course material two years after the information is no longer current.	SO	2y	FR
22570-20	The government archives will fully retain outreach program development and analysis files ten years after analysis is complete.	SO+1y	9y	FR
22700-04	The government archives will fully retain STD/AIDS lecture notes and presentation materials when the information is no longer current.	SO	nil	FR
22800-02	The government archives will fully retain STD/AIDS, provincial AIDS strategy, and STD core program treatment standards and guidelines five years after new or revised standards are issued.	SO	5y	FR
22500-20	The government archives will selectively retain public health program development and analysis files ten years after analysis is complete.	SO+1y	9y	SR
22800-20	The government archives will selectively retain clinical research project case files five years after the project final report is completed or abandoned.	SO	5y	SR

Section 4

TUBERCULOSIS CONTROL SERVICES

Records relating to the prevention, treatment and control of tuberculosis.

23400-20	The government archives will fully retain tuberculosis clinic patient files ten years after the patient ceases to attend treatment and no further follow up action is required.	SO+1y	9y	FR
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		<u>A</u>	<u>SA</u>	<u>FD</u>
23700-40	The government archives will fully retain tuberculosis studies and reports six years after the study or report is completed or abandoned.	SO+1y	5y	FR
23700-30	The government archives will selectively retain tuberculosis research projects six years after the project final report is completed or the project is abandoned.	SO+1y	5y	SR
All other records (all sections)				DE
All other records are destroyed at the end of their active and semi-active retention periods. The retention of these records varies depending on the nature of the records and the function performed, but generally does not exceed seven years. These records have no residual values to government at the end of their scheduled retention periods. The exceptions are:				
20400-20	Release of emergency biological products case files will be retained for twenty-four years after the calendar year of their creation or receipt. They will then be destroyed. The twenty-six year retention period ensures that records are retained until the expiration of the right, including the right of minors upon reaching the age of majority, to initiate legal action.	CY+1y	25y	DE
21120-20, -25 & -30	Food-borne botulism case files, infant botulism case files, and food poisoning outbreak investigations will be retained for twenty-six years after completion of the investigation. They will then be destroyed. The twenty-five year retention period ensures that records are retained until the expiration of the right, including the right of minors upon reaching the age of majority, to initiate legal action.	SO+1y	25y	DE

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		<u>A</u>	<u>SA</u>	<u>FD</u>
21180-06 to -11	Culture worksheets - hantavirus, - human references, - rodent cultures, - tick cultures, and reference reports - human, - tick, will be retained for fifteen years after the fiscal year of creation or receipt. They will then be destroyed. The fifteen year retention period ensures that records are retained for research and evaluation purposes.	FY+5y	10y	DE
21600-02 & 21600-20	Laboratory accreditation files, and proficiency testing programs and results, will be retained for ten years after accreditation is renewed, revoked or abandoned. They will then be destroyed. The ten year retention period ensures that records are retained for analysis and review.	SO+3y	7y	DE
21700-02, -03 & -04	Specimen test requisitions and results, culture logbooks, and laboratory diaries will be retained for fifteen years after the calendar year of creation or receipt. They will then be destroyed. The fifteen year retention period ensures that records are retained for research and analysis.	CY+5y	10y	DE
22300-20	HIV antibody test counselling visit case files will be retained for ten years after test results have been communicated to the patient and no further follow-up action is required. They will then be destroyed. The ten year retention period ensures that patient records are retained in accordance with ministry and hospital practice.	SO+1y	9y	DE
22300-40	STD clinic patient files will be retained for ten years after the patient ceases to attend treatment and no further follow-up action is required. They will then be destroyed. The ten year retention period ensures that patient records are retained in accordance with ministry and hospital practice.	SO+1y	9y	DE

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23200-04	Statistics Canada tuberculosis yearly reports will be retained for nine years after the calendar year of creation or receipt. They will then be destroyed. The ten year retention period ensures that records are retained for analysis and review.	CY+2y	7y	DE
23400-30 & 23400-40	Tuberculosis screening program client files - adults - positive and negative results, and tuberculosis screening program client files - minors - negative results, will be retained for ten years after test results are communicated to the client, and/or treatment is completed and no further follow-up action is required. They will then be destroyed. The ten year retention period ensures that patient records are retained in accordance with ministry and hospital practice.	SO+1y	9y	DE
23400-50	Tuberculosis screening program client files - minors - positive results will be retained for twenty-six years after test results are communicated to the client, and/or treatment is completed and no further follow-up action is required. They will then be destroyed. The twenty-six year retention period ensures that records are retained until the expiration of the right of minors, upon reaching the age of majority, to initiate legal action.	SO+1y	25y	DE
23400-60	Tuberculosis x-rays will be retained for ten years after the patient ceases to attend treatment and no further follow-up action is required. They will then be destroyed. The ten year retention period ensures that x-rays are retained in accordance with ministry and hospital practice.	SO+1y	9y	DE

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COMMUNICABLE DISEASE CONTROL SERVICES
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SECTION 3	22000-22999	SEXUALLY TRANSMITTED DISEASE/AIDS CONTROL SERVICES
SECTION 4	23000-23999	TUBERCULOSIS CONTROL SERVICES

ISO	ARS	ADVERSE REACTION SYSTEM
	BPMS	BIOLOGICAL PRODUCTS MANAGEMENT SYSTEM
	CDSS	COMMUNICABLE DISEASE SURVEILLANCE SYSTEM
	CDSS/EPID	EPIDEMIOLOGY SECTION
	CDSS/FIELD	FIELD SECTION
	ISS	INFLUENZA SURVEILLANCE SYSTEM
		LABORATORY SYSTEM
		PHARMACY SYSTEM
	STDCIS	STD CONTROL INFORMATION SYSTEM
	TBCS	TUBERCULOSIS CLINIC SYSTEM

GLOSSARY

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INTRODUCTION

INFORMATION AND DATA MANAGEMENT BRANCH

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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- 2.2 The Classification System
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PART 1 THE OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

1.1 Introduction

An *Operational Records Classification System (ORCS)* is a tool to facilitate the organization, retrieval, storage, and disposition of operational records throughout their life cycle, from creation to final disposition. Operational records relate to the operations and services provided by your division in carrying out the functions for which it is responsible according to statute, mandate, or policy. Examples of these functions include the development and supervision of Aboriginal health education programs, the conducting and monitoring of Aboriginal health research projects, and providing advice relating to health issues in the negotiation of First Nations treaties, and negotiating non-treaty self-government agreements for the delivery of health services.

Administrative records are common to all units of government and are usually distinct from operational records. Administrative records support housekeeping functions such as the management of facilities, property, materiel, finances, personnel, and information systems. Administrative records also relate to common management processes, including committees, agreements, contracts, information services, legal opinions, and other similar functions. Although these records are considered administrative, they may have considerable operational impact.

Information and Data Management Branch (IDMB) has developed a standard government-wide classification system for all administrative records of the Government of British Columbia. It is known as the *Administrative Records Classification System (ARCS)*. ARCS provides common headings for classification of common records across government.

Each ORCS is tailored to fit the specific operational records of a unit of government. This ORCS covers all operational record series created or received by your division since April 1993. It does not include older record series to which additions are no longer being made. To obtain approval for disposition of such records, submit via your Records Officer one records services application (form ARS 118) for each record series.

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

1.2 **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, magnetic tape, diskettes, 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 division's 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.

The structure and organization of *ORCS* is described in detail in the "How To Use *ORCS*" section. All technical terms used here and elsewhere are defined for your convenience in the glossary which is located at the back of the "How To Use *ORCS*" section.

The primary purposes of *ORCS*:

- *ORCS* is a tool for executive control of recorded information.
- *ORCS* provides a legal basis on which the integrity, authenticity, impartiality, and completeness of operational records may be established.
- *ORCS* is a key element of an agency's vital records program.
- *ORCS* is a retrieval device to aid effective management of resources.
- *ORCS* is a filing and records classification system for information resources.
- *ORCS* is a management plan for the retention and disposition of records.
- *ORCS* is a framework for the audit and review of operational functions.

1.3 **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). Record is defined broadly to include all recorded information regardless of physical format:

"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 IDMB and government ministries. This *ORCS* was reviewed by IDMB staff, your ministry 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 the Aboriginal Health Division.

Some categories of records or data have special retention and disposition requirements and may be handled by developing special records schedules. These schedules can be standardized for all ministries, and can cover both administrative and operational records. They can be used effectively to dispose of routine records and ephemeral material, can be adjusted to meet the retention problems posed by changing technologies, and can protect the long-term values of executive records.

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

- Transitory Records
- Transitory Electronic Records
- Electronic Mail
- Word Processing Records
- Special Media Records (including photographs, motion pictures, audio-visual materials, videotapes, etc.)
- Executive Records
- Commission of Inquiry Records
- Record Copies of Published Maps

See the special schedules section of the *ARCS* manual for a description of these records and the records retention and disposition schedules covering them.

PART 2 AN EFFECTIVE RECORDS MANAGEMENT SYSTEM

2.1 Introduction

This part outlines the major features of a records management system and describes the tools needed for effective filing operations.

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

- The Classification/Scheduling System
- The File List
- Finding Aids (indexes and cross-reference guides)
- Filing and Maintenance Procedures
- Boxing and Transfer Instructions.

2.2 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 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.

For the frequent user, searching for a place to file a commonly used record, *ORCS* verifies classification. For both the experienced and the inexperienced user faced with a new subject or form, *ORCS* indicates the appropriate primary location for the record. For all users, *ORCS* provides a catalogue of general subject headings for retrieval and access.

The classification system is the basis for other finding aids, such as file lists and indexes. *ORCS* indicates all of the operational records which **might** exist in an office. The file list documents those files which have actually been opened.

2.2.1 Staff Responsibilities and Procedures

IDMB 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 typed, photocopied, or distributed. Over time, your correspondents will begin to quote your file number on return mail and less incoming mail will require classification.

IDMB 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.

2.2.2 Classifying Records

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

IDMB 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.

Records are classified based upon how they will be referenced or 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.

Use either the alphabetic subject index or the broad subject approach, or a combination of the two, to decide upon a number. Remember that the number reflects the subject 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. If the appropriate classification was difficult to locate, consideration should be given to updating the index. For a discussion of the index, see part 2.4 of this introduction.

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.

c) Policy and Procedures Files

Within each primary, the standardized secondary -00 is reserved as a policy and procedures file. This secondary is used for records that reflect usages, regulations, precedents and other material which in some way document management decisions on the subject matter of the primary.

Policy and procedures files contain records relating to the plans, decisions, and actions embracing the general goals and acceptable procedures of the creating 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 inquiries regarding policy.

d) General Files

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 record does not fall within any of the existing secondaries, but does fall within the primary.
- The record deals with two or more subjects in the primary. In this situation, you could be more precise and file the original or a photocopy of the record in each specific file.
- There is no existing classification number for the document. The general number is used until the subject is significant enough to warrant creating a new primary or secondary number and title.

In cases where the retention period for secondary -01 is shorter than that of the specific subject or case file secondary, and/or the records are scheduled for selective or full retention by the government archives, a separate file **must** be opened.

2.3 The File List

The file list is a listing of each file which is currently in use or which has been created within an office. An accurate file list is an essential record, 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. Please note that these file lists cover 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.

2.4 Other Finding Aids

There are a wide variety of finding aids which may be 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 included with this *ORCS* 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 subjects or forms which are commonly used, 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 operational records, IDMB has compiled lists of standard codes currently used by various ministries and agencies of the British Columbia Government. These codes are included in appendices A - H. Appendix G also describes one method that might be used to create standardized file codes (see also "How to use *ORCS*", part 2.4). These codes are included in the appendices in the *ARCS* manual.

2.5 **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 functions or activities of filing and maintenance are:

- Mail Management
- Sorting
- Registration
- Classification
- Indexing and Cross-reference
- Location Control
- Filing
- Charge-out
- Distribution
- Recall and Search
- Refiling
- 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.

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 procedures to cover those functions which they require. Filing and maintenance procedures are classified in *ARCS* 423-02. Your Records Officer can help to develop appropriate procedures for your office.

2.5.1 **File Maintenance**

An *ORCS* covers many types of operational records stored in various physical formats. The agency responsible for the records has special needs and requirements for its filing system. Each agency must establish standards for maintaining their files. For many offices, the following system works best.

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

IDMB supports Project ELF (Eliminate Legal-size Files) and recommends the use of letter size file folders, paper and filing equipment wherever possible. The purpose of ELF 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 initiative.

The file folder label is prepared 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 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 labeled 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 use becomes infrequent. 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, IDMB 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 1991"; "for SR on 1 April 1992"; "for FR on 1 April 1990").

Minimize misfiles in the following ways:

1. Keep file labels legible and simple.
2. Maintain 3-4 inches of free space on each file shelf or drawer.
3. Place papers in folders so they do not go beyond the scoring on the folder or cover the file label.
4. Write correct file number or heading on each document or underline it if it appears in the text.

2.5.2 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.

2.6 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, IDMB. Each office should document instructions and procedures for the regular boxing and transfer of records to off-site storage. For a discussion of records schedules, please see parts 2.9 and 2.10 of "How To Use *ORCS*" which follows this introduction.

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. Notify your Records Officer before any destruction of records occurs.

To identify records suitable for boxing, review the *ORCS* schedules annually and determine what operational records have become semi-active or inactive during the past year. 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.

2.6.1 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 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: 91-0123-1

91-0123 = the accession number issued by Records Centre Services
-1 = 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

IDMB 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 ongoing accession number is to group together the same type of records and facilitate transfer of those records. The ongoing accession number 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 ongoing accession number applies.

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

If 91-0123 were a real ongoing accession number, 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 ongoing accession number 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 ongoing accession number 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 ongoing accession number. Other special arrangements may be made in consultation with your Records Officer and Records Centre Services.

c) Ongoing Accession Numbers for the Communicable Disease Control Services

In ORCS, ongoing accession numbers have been established for the following categories of OPR records. The accession numbers are based upon semi-active retention periods and final disposition recommendations. The Records Officer is responsible for maintaining the list of ongoing accession numbers related to the ORCS.

<u>ONGOING ACCESSION NUMBERS:</u>		<u>SA</u>	<u>FD</u>
91-0597	<u>EXAMINATION AND TREATMENT OF TUBERCULOSIS PATIENTS – TUBERCULOSIS CLINIC PATIENT FILES</u> 23400-20 Records selected for retention	9y	FR

2.6.2 Transfer of Semi-Active Records to Off-site Storage

Records Centre Services provides off-site storage for all records which have a scheduled semi-active retention period. If a records schedule does not provide for semi-active storage for a record series which, in your opinion, requires it, contact your Records Officer to propose that the schedule be amended.

You should organize semi-active records for transfer as follows:

1. Box semi-active records scheduled for DE (Destruction) separately from semi-active records scheduled for SR (Selective Retention) or FR (Full Retention) by The government archives (see "How to Use ORCS," part 2.10.3, for definitions).
2. Box records of the same type together if possible. For example, case file series or large subject file series should be boxed together.
3. If records have different semi-active retention periods, box first by retention period and then within retention periods by primary and secondary numbers.
4. Arrange boxes by the length of the semi-active retention period, placing boxes with the longest retention period at the beginning of the accession.

For records which do not have a scheduled semi-active retention period, but which have a scheduled final disposition of selective or full retention by The government archives, see Part 2.6.3 regarding the transfer of inactive records to off-site storage.

2.6.3 Transfer of Inactive Records to Off-site Storage

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.

Records Centre Services also provides off-site storage for records scheduled for destruction in a **draft** schedule where there is no scheduled semi-active retention period or where the semi-active retention period has already expired. Such records will be stored until the schedule is approved by the Legislative Assembly.

Boxing and delivery instructions will vary depending upon the final disposition, age, volume, and location of the records. Records Centre Services will in some instances contact you to discuss the records or to arrange to see them prior to boxing.

You should organize inactive records for transfer as follows:

1. Box inactive records scheduled for SR (Selective Retention) or FR (Full Retention) separately from all other records.
2. Box records in primary and secondary number order.

2.7 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. That legislation affects the design, development, retention scheduling, and implementation stages of all operational and administrative records classification systems.

For information about whether your records are exempt under the legislation, how your agency plans to disclose information under this legislation, or how to determine if your records contain personal or confidential material, please contact your agency's Records Officer or Manager/Director of Information and Privacy. If you have questions specific to file operations or procedures, please contact your Records Officer.

2.8 Information System Overview

Information that has been created, collected, maintained and/or retained by a government agency is classified and scheduled within *ORCS*, regardless of media. 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 an Application (ISOA).

HOW TO USE ORCS

For further information, call your Records Officer,
Sara Shea, 952-2179

INFORMATION AND DATA MANAGEMENT BRANCH

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

PART 1: The Organization of an *Operational Records Classification System*

- 1.1 Classification System
- 1.1.1 Information System Overview
- 1.2 Implementation of *ORCS*
- 1.3.1 Review and Evaluation
- 1.3 Operational Reviews
- 1.4 Advisory Services
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PART 2: The Structure of an *ORCS*

- 2.1 Primary Number and Title
- 2.2 Scope Note
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 - 2.3.1 Reserved Secondary Numbers
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- 2.4 Coded Series
 - 2.4.1 Coded Case File Series
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- 2.6 Freedom of Information and Protection of Privacy Flags
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- 2.8 Levels of Responsibility
- 2.9 Records Retention and Disposition Schedule Format
 - 2.9.1 Active Retention Period Column
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 - 2.9.3 Final Disposition Column
- 2.10 How to Read the Records Schedule
 - 2.10.1 Abbreviations Used in the Active Retention Period Column
 - 2.10.2 Abbreviations Used in the Semi-active Retention Period Column
 - 2.10.3 Abbreviations Used in the Final Disposition Column
- 2.11 Media Designations
- 2.12 Vital Records Flags

PART 1 THE ORGANIZATION OF AN ORCS

1.1 A Classification System

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 subject 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.

ORCS is divided into four broad groupings of primary subjects which correspond to major operational functions and program activities. These groupings are called sections:

<u>Section Numbers</u>	<u>Primary Number Allotted to Section</u>	<u>Section Title</u>
Section 1	20000-20999	Communicable Disease Control Services
Covers records relating to communicable disease surveillance, prevention and control.		
Section 2	21000-21999	Provincial Laboratory Services
Covers records relating to public health, diagnostic and reference microbiology testing; consultation; and research and development services to investigate, diagnose and control communicable diseases and respond to environmental health problems.		
Section 3	22000-22999	Sexually Transmitted Disease/ AIDS Control Services
Covers records relating to the prevention and control of sexually transmitted diseases (STDs), including Human Immunodeficiency Virus/ Acquired Immune Deficiency Syndrome (HIV/AIDS).		
Section 4	23000-23999	Tuberculosis Control Services
Covers records relating to the prevention and control of tuberculosis.		

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.

Primary subjects are usually arranged in an alphabetical sequence, except for the first primary within a section or primary block. The first primary is the general primary and contains records of a general nature relevant to the entire section or primary block, as well as individual general subjects which do not justify being assigned a separate primary. The numerical arrangement of the section or primary block is sufficient to permit expansion and amendment.

A primary may contain 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 subnumber called a **secondary number**. Secondary numbers signify subdivisions subordinate to the major function of the primary subject and describe and delineate specific types or series of records. When a greater detail of files is required for any sub-subject, the subordinate files may be coded.

A secondary may contain records created in various media, such as paper, microfilm, microfiche, magnetic media, and optical disk. In addition, Personal Information Banks (PIB), Public Use Records (PUR) and Vital Records (VR) are identified, classified and scheduled at the secondary or record series level.

1.1.1 Information System Overview

Information that has been created, collected, maintained and/or retained by a government agency must be classified and scheduled within *ORCS*, regardless of media. Input records, computer generated reports, and the electronic records themselves, are integrated into *ORCS* and retention periods and final dispositions are assigned. 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 an Application (ISOA).

Information to be included within an ISO/ISOA includes the purpose of the system or application, sources of information for the system, output reports, hardware and software specifications, system milestones, etc.

1.2 Implementation of ORCS

One of the chief features of *ORCS* is the integration of the records classification system with the records retention and disposition schedule. As a result, use of *ORCS* as a records retention and disposition schedule depends upon systematic implementation and effective maintenance of the classification system, in accordance with standards established by Information and Data Management Branch (IDMB) and the agency responsible for the records.

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, should be contacted for further information whenever necessary. If you cannot determine who your Records Officer is, call IDMB at 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. Designation of 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.

1.3 Review and Evaluation

Before a ministry, agency, or Crown corporation can be granted the ongoing authority to use the schedules in *ORCS* for the disposition of government records, a review and evaluation of records management systems and operations may be required to provide assurance to senior management and Treasury Board that records management policies and standards are being applied effectively.

An evaluation would include a review of the agency's records management systems, operations, and facilities for compliance with both internal and government-wide policies and standards.

1.3.1 Operational Reviews

Operational reviews will be conducted at intervals of not more than five years, as authorized by the agency's senior management. Review and evaluation teams will comprise appropriate representatives of one or several of:

- Ministry or agency staff (e.g., internal auditors);
- The Office of the Comptroller General;
- Information and Data Management Branch; or
- Private sector agencies under contract to IDMB.

1.4 Advisory Services

IDMB 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 that may be provided by your records officer are:

- Project planning and coordination assistance
- File conversions
- A records management training program
- Selection of 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 custodianship
- Automation of records management functions.

1.5 **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 is dependent 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.

IDMB maintains the master edition of this *ORCS* and is responsible for administering the amendment and review process. The Records Officer is responsible for advising IDMB of proposed amendments. Distribution of amendment pages is a responsibility of the agency. Amendments will be effective upon the approval of the Legislative Assembly. The agency responsible for the records will implement amendments within one year of legislative approval.

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 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 IDMB. Proposals will be jointly reviewed by IDMB staff and the Records Officer.

Changes in the status of primaries, secondaries, and scope notes will be highlighted 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 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.

PART 2 THE STRUCTURE OF AN ORCS

Although the structure of this *Operational Records Classification System* has been described in the "Introduction", you will need to know more about it in order to apply the ORCS schedule effectively.

Here is a sample primary to illustrate the structure of ORCS. The pages which follow this example explain each of the numbered items:

- 2.1 Primary Number and Title
- 2.2 Scope Note
- 2.3 Secondary Number and Title
- 2.4 Coded Series
- 2.5 Interim Secondary Number and Title
- 2.6 Freedom of Information and Protection of Privacy Flags
- 2.7 Explanatory Notes
- 2.8 Levels of Responsibility
- 2.9 Records Retention and Disposition Schedule Format
- 2.10 Records Schedule Key
- 2.11 Media Designations
- 2.12 Vital Records Flags.

SAMPLE PRIMARY TO ILLUSTRATE ORCS

			<u>A</u>	<u>SA</u>	<u>FD</u>
21600	<u>PERFORMANCE EVALUATION AND ACCREDITATION</u>	1			
	Records relating to proficiency testing and laboratory accreditation programs administered by outside agencies as well as internal quality control monitoring of media, reagents and procedures to ensure proper performance in the isolation and identification of microbial pathogens. Includes College of American Pathologists (CAP) surveys, proficiency tests and results, quality control logs, reports, correspondence and memoranda.	2			
	Unless otherwise specified below, the ministry OPR (Aboriginal Health Division) will retain these records for:		CY+1y	2y	DE
	Except where non-OPR retention periods are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Laboratory accreditation	3	SO+3y	7y	DE
	SO = when accreditation is renewed, revoked or abandoned				
	10y = This retention period ensures that accreditation program records are retained for analysis or review				
-03	Quality control logbooks				
-04	Interim secondary title	5	FY+2y	4y	DE
PIB 6	-20 Proficiency testing programs and results (arrange alphabetically by test)	4	SO+3y	7y	DE

(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

7	SO =	when accreditation is renewed, revoked or abandoned
	10y =	This retention period ensures that proficiency records are retained for analysis and review.

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

2.1 Primary Number and Title

Each operational subject title is allocated a unique five-digit primary number and title within *ORCS*. A primary number is used to classify all information related to a subject or function, regardless of its physical formats.

2.2 Scope Note

The scope note describes the functions, uses and content of the records which are to be classified within a primary records classification. A scope note indicates the administrative or operational function to which the records relate and should give a general statement about the record types (memos, forms, reports, etc.) and media (photographs, video recordings, etc.) covered.

A scope note may also contain information about the method(s) of records arrangement or organization, finding aids and indexes, records usage, information sources, records which are specifically excluded from the primary classification and filed elsewhere, and sources in which the information is reported in summary form. Freedom of information and privacy legislation considerations may be included.

2.3 Secondary Number and Title

Secondary numbers and titles designate subdivisions of the primary subject. The two-digit secondary number is added to the five-digit primary number to form a complete file number. Secondary numbers and titles describe specific types of records and link them to the records retention and disposition schedule.

To ensure proper use and maintenance of the records schedules, secondaries within a given primary in this *ORCS* are standardized. All offices should use the same number to refer to the same record. Standardization ensures continuity and consistency in retention and disposition of operational records.

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

2.3.1 Reserved Secondary Numbers

Two secondaries have been reserved throughout all *ORCS* and the *Administrative Records Classification System (ARCS)*. Secondary number -00 is always reserved for "Policy and procedures" which reflect operational functions, policies, procedures, regulations, and precedent or which reflect management decisions and usage. Secondary number -01 is always reserved for general records which cannot be classified in the specified subject or case file secondaries. For further discussion, see the introduction.

2.3.2 Subject Secondary Numbers

Within a primary, subject secondaries represent files for specific subjects. A subject file usually brings together records and information on one topic in order to facilitate information retrieval.

Subject secondaries are usually assigned secondary numbers -02 to -19. Sometimes, when the need to break down a subject secondary by coding has been anticipated, the secondary has been assigned a number at -20 or above.

2.3.3 Case File Secondary Numbers

Case file series are usually assigned secondary numbers -20 and above (-30, -40, -50, etc.). Case file series consist of many different files relating to a common function, each of which 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 standardized. (See part 2.4 for additional information on subdivisions.)

2.4 Coded Series

Reserved, subject, and case file secondaries may be subdivided through the use of codes.

2.4.1 Coded Case File Series

When a case file secondary (e.g., client files, mineral claim files, property files) is coded, the result is a coded case file series.

Case file series are sometimes arranged by the full name or title of the case (person, event, project, transaction, product, organization, etc.), but are, for the purposes of abbreviation and identification, more commonly arranged by numeric or alphabetical codes (abbreviations) which correspond to the entities to which the files relate. An oblique (/) separates the identifying code from the secondary number.

2.4.2 Coded Subject File Series

When a reserved or subject secondary is coded, the result is a coded subject file series. Although case files are the most common example of coded series, codes may also be used to arrange subject secondaries where coding will facilitate retrieval (e.g., studies on different aspects of one interprovincial agreement).

Coding is used to subdivide a secondary subject file when all sub-subjects require the same active and semi-active retention periods and when the number of sub-subjects is likely to be large or when the topics or names covered by sub-subjects will vary over time. As a result, coded subject file series usually consist of many different files, each dealing with a different aspect of the same subject. The records within a coded subject series usually vary from file to file.

Subject files are often arranged by the full name or title of the sub-subject, but are sometimes arranged by alphabetical codes (abbreviations) which correspond to the sub-subjects to which the files relate. An oblique (/) separates the identifying code from the secondary number.

2.5 Interim Secondary Number and Title

When a secondary title not included in *ORCS* is required, an office may open a file under an interim secondary title by placing the asterisk symbol "*" in front of the temporary number. To obtain interim secondary numbers, contact your Records Officer immediately. In turn, your Records Officer will refer interim secondary numbers to IDMB for scheduling. Those which are approved will be included in *ORCS* when your manual is updated (see part 1.5 for further information regarding the amendment and review process).

2.6 Freedom of Information and Protection of Privacy Flags

IDMB requires that all Personal Information Banks (PIB) and Public Use Records (PUR) be flagged within a records classification system. The flags are placed in the left-hand column, directly in front of the secondary that they qualify.

PIB	-20	SECONDARY TITLE	SO	2y	DE
PIB/ PUR	-45	SECONDARY TITLE (arrange by address)	CY+1y	nil	SR

In certain instances, a more specific justification as to why the information contained in a record series is restricted from public disclosure is required for inclusion in the records classification system. In those cases, a special form of explanatory note 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.

-20	SECONDARY TITLE	3y	5y	SR
FOI: As these records DO WHAT?, access is restricted under section ?? of the <i>Freedom of Information and Protection of Privacy Act</i> (RSBC 1996, c. 165).				

If you have any questions on procedures for information disclosure, or if your records contain personal information or confidential material as defined in the legislation, please contact either your agency's Records Officer or Manager/Director of Information and Privacy.

2.7 **Explanatory Notes**

Explanatory notes may be used in *ORCS* to refer to the internal structure of *ORCS* or to provide information critical to understanding the system. Notes may also be used to explain office procedures and practice or to summarize statutory provisions governing the creation, processing, access to, or disposition of documents.

Retention notes explain why records are retained for a certain length of time, or explain the reasons for the final disposition of documents.

SO notes indicate upon what event, or when, primaries and/or secondaries are superseded or obsolete.

General notes give general information.

2.8 **Levels of Responsibility**

The retention and disposition requirements for records which are duplicated in central service or headquarters branches and field offices often differ. In recognition of these differing requirements, *ORCS* contains two statements regarding the levels of responsibility for records within an agency.

For each primary subject, *ORCS* distinguishes between the office or offices having primary responsibility for a category of records (OPR[s]) and all other offices which hold copies of the same records (non-OPRs). 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.

For secondaries which have retention or disposition requirements different from the general 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.

The Records Officer will ensure that the office or offices which have primary responsibility for the retention and disposition of records classified in each primary are designated and notified that they are to retain those records as the OPR. The Records Officer will on an ongoing basis notify IDMB of changes to the OPR.

The office of primary responsibility (OPR) for all primaries in Section 1 is Communicable Disease Epidemiology Services, except 20800 PHARMACY SERVICES - GENERAL, and 20900 PHARMACY SERVICES - PATIENT MEDICATION, which is Pharmacy Services. The OPR for all primaries in section 2 is the Provincial Laboratory Division. The OPR for all primaries in Section 3 is the Division of STD/AIDS Control. The OPR for all primaries in Section 4 is the Division of Tuberculosis Control.

2.9 Records Retention and Disposition Schedule Format

Schedule information for each record series is indicated in the three columns to the right of the classification system. 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 part 2.10, "How to Read the Records Schedule."

2.9.1 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 records which are referred to and required constantly for current use in the conduct of business and which need to be retained and maintained in the office space and equipment of the user.

If retrieval and reference access is more than one reference per linear foot (30 cm) per month, the records are active. Active records are maintained and stored in the offices of the agency responsible for the records.

2.9.2 Semi-active Retention Period Column

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

Semi-active records are records which are not required constantly for current use and need not be maintained in the expensive office space and equipment of the agency responsible for them. Semi-active records still retain administrative, operational, fiscal, audit, or legal value. Storage of semi-active records in economical, off-site facilities until all values have lapsed results in considerable savings.

If retrieval and reference access is less than one reference per linear foot (30 cm) per month, the records are semi-active and should be transferred to the off-site storage facilities provided by Records Centre Services, IDMB. For boxing and transfer instructions, see "Introduction," part 2.6.

The active and semi-active retention periods ensure that records are kept as long as required to meet any operational, administrative, legal, fiscal, audit, or other primary values which the records may hold. By retaining records for the retention periods specified in the records schedule, creating offices will comply with statutory, regulatory, and policy requirements to maintain certain types of information and data.

2.9.3 Final Disposition Column

The final disposition (FD) column ensures that records with residual values are preserved and those which have no residual values are destroyed.

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

2.10 How to Read the Records Schedule

ORCS includes a record retention and disposition schedule which 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 should be.

For each primary number, general retention and disposition values are assigned for OPR and non-OPR offices. The following format is used:

	<u>A</u>	<u>SA</u>	<u>FD</u>
21800 <u>DISEASE DIAGNOSIS RESEARCH AND DEVELOPMENT</u>			
Unless otherwise specified below, the ministry OPR (Aboriginal Health Division) will retain these records for:	CY+1y	2y	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>

The OPR and non-OPR retention and disposition apply to all records included in the primary except where specific retention and disposition values are assigned for a secondary. For instance, in the example below, the retention and disposition schedule for secondary -20 is:

	<u>A</u>	<u>SA</u>	<u>FD</u>
21800 <u>DISEASE DIAGNOSIS RESEARCH AND DEVELOPMENT</u>			
-20 Disease diagnosis research and development project files	- OPR SO - <u>non-OPR</u> <u>SO</u>	nil <u>nil</u>	FR <u>DE</u>

The general retention and disposition values do not apply because retention information is specified for the secondary. The OPR will retain these records in active office space for the calendar in which they were created plus an additional two years. The records will then be transferred to the off-site storage facilities provided by Records Centre Services, IDMB.

All other offices are non-OPR offices and will retain these records in active office space until superseded or obsolete. The records will then be destroyed.

The key at the bottom of each ORCS page indicates the abbreviations used. The pages which follow explain how to read and interpret the records schedule and the possible abbreviations for each of the three columns.

2.10.1 **Abbreviations Used in the Active Retention Period Column**

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 which should 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 two 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. It delegates the entire responsibility for retention and disposition of the records to the agency responsible for them. Records which have the above retention and disposition schedule may be destroyed when no longer required for operational purposes.

For information on destruction services, contact your Records Officer.

ii) Specific Definition of SO

"SO" is also used to identify the active retention period for records which must be retained until a case is closed or some other event occurs to end requirements for the records. 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.

For instance, in the example below, the retention and disposition schedule for secondary -50 is:

			<u>A</u>	<u>SA</u>	<u>FD</u>
23700	<u>TUBERCULOSIS ISSUES, STUDIES AND REPORTS</u>				
-30	Tuberculosis research projects	- OPR	SO+1y	5y	SR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>

SO = when project final report is completed or project abandoned

The OPR will retain research project files in active office space for one year after completion of the project. The records will then be transferred to off-site storage.

NA = Not Applicable

"NA" is used in ORCS to identify records which are classified in another primary and/or secondary during their active retention period. For example, in *ORCS* primary 82200 CLIENT TRACKING, secondary -08 is the classification for withdrawn referrals. "NA" is indicated in the active column because these records were previously classified in -07 Referrals.

2.10.2 Abbreviations Used in the Semi-active Retention Period Column

m = month

y = year

nil = no semi-active retention period

"Nil" in the semi-active column is used 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 archival custodianship. Otherwise, the final disposition of such records is usually physical destruction.

For instance, in the example below, the retention and disposition schedule for secondary -20 is:

			<u>A</u>	<u>SA</u>	<u>FD</u>
21130	<u>LABORATORY SERVICES - GENERAL BACTERIOLOGY</u>				
-06	General bacteriology sensitivity testing results	- OPR - <u>non-OPR</u>	FY+1y <u>SO</u>	nil <u>nil</u>	DE <u>DE</u>

The OPR retains General bacteriology sensitivity testing results in active office space until the information that they contain is no longer current. As there is no semi-active period, the records are ready for immediate destruction upon expiry of the active period.

NA = Not Applicable

"NA" is used in ORCS to identify records that are reclassified to another primary and/or secondary when they are closed or when their use or function changes. For example, in ORCS primary 22520 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS - B.C. NATIVE AIDS AWARENESS PROGRAM, secondary -02 is the classification for workshop plans. "NA" is indicated in the semi-active column because these records are reclassified as -03 workshop evaluation files for their semi-active retention.

2.10.3 **Abbreviations Used in the Final Disposition Column**

Some government records contain information or data that has long-term value to the agency responsible for them, the government generally, or to the public. These records are part of the documentary heritage of the Province of British Columbia and are transferred to the custodianship of the government archives for archival preservation. The final disposition of operational records which have enduring value can be:

FR = Full Retention by the government archives

"FR" means that the government archives has determined that all of the records in a secondary have enduring value. The government archives preserves in its entirety and in an accessible format the recorded information contained in such records. 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.

SR = Selective Retention by the government archives

"SR" means that the the government archives has determined that a portion of these records have enduring value and should be retained. The archivist responsible selectively retains portions of the record series by means of a percentage, statistical, or random sample, or by other recognized archival selection criteria.

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 "Introduction," part 2.6.

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 which have no residual value or insufficient public value to justify their preservation is physical destruction.

2.11 **Media Designations**

All government records, regardless of physical media, must be classified under either an ARCS or ORCS secondary number. The information content of different media versions of a single record series remains the same, only the physical format for the record series changes.

Media designations used in this ORCS are: paper and database. Retention periods are specified for each media designation, unless the primary's default retention periods apply.

2.12 Vital Records Flags

IDMB recommends that the vital records (VR) of an 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.

VR	-20	SECONDARY TITLE	??	??	??
PIB/ PUR/VR	-45	SECONDARY TITLE	??	??	??

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

SECTION 1

COMMUNICABLE DISEASE CONTROL SERVICES

PRIMARY NUMBERS

20000-20999

Section 1 covers records relating to communicable disease surveillance, prevention and control according to the *Health Act* (RSBC 1996, c. 179) and the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83). This includes records relating to: applied public health research; consultation with health practitioners, government staff and the public about public health issues; development and co-ordination of disease control policy; communicable disease surveillance; investigation of disease outbreaks; procurement and distribution of biological products; and distribution of pharmaceuticals to clients of disease control programs.

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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A SA FD

20000 - COMMUNICABLE DISEASE CONTROL SERVICES - 20999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

20000	COMMUNICABLE DISEASE CONTROL SERVICES - GENERAL
20200	DISEASE CONTROL - GENERAL
20210	- OUTBREAK INVESTIGATION
20240	- ISSUES, REPORTS AND STUDIES
20260	- STANDARDS AND GUIDELINES
20280	- SURVEILLANCE
20400	IMMUNIZATION - GENERAL
20420	- ADVERSE REACTIONS TO IMMUNIZING AGENTS
20450	- PROGRAMS AND PROGRAM MONITORING
20600	BIOLOGICAL PRODUCTS - GENERAL
20630	- PROCUREMENT AND DISTRIBUTION
20800	PHARMACY SERVICES - GENERAL
20900	- PATIENT MEDICATION

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20000	<u>COMMUNICABLE DISEASE CONTROL SERVICES -GENERAL</u>				
	Records not shown elsewhere in the communicable disease control services section which relate generally to the prevention and control of communicable diseases according to the <i>Health Act</i> (RSBC 1996, c. 179). This includes records relating to public health consultation, research and policy development, vaccines and vaccinations, disease outbreaks, and epidemiologic surveillance. Includes correspondence and memoranda.				
	NOTE: Only records which cannot be classified in a more specific primary or secondary may be classified under this primary.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
4y =	This ensures that the primary operational requirements of the creating agency are met.				
FR =	The government archives will fully retain all policy and procedure files created by offices having primary responsibility for policy and procedure development and approval for their evidential value. Draft and duplicate materials which hold no evidential value may be purged and discarded.				

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
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			<u>A</u>	<u>SA</u>	<u>FD</u>
20200	<u>DISEASE CONTROL - GENERAL</u>				
	Records relating generally to the provision of expert advice regarding communicable diseases. This includes consultation with health professionals, other government staff and the general public; regular and ad hoc postings to private electronic bulletin boards; and delivering lectures, workshops and presentations. Includes correspondence, memoranda, presentation material, consultation logs, and reference material.				
	For communicable disease issues, studies and reports, see primary 20240.				
	For education and training, see ARCS primaries 1730 to 1740.				
	For outbreak investigations, see primary 20210.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		CY+1y	2y	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-02	Bulletin board input originals		CY	nil	DE
-03	Disease control consultation logs				
-20	Communicable diseases subject files (arrange alphabetically by disease)		SO	nil	DE
	SO = when information is no longer current				

(Continued on next page)

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

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		<u>A</u>	<u>SA</u>	<u>FD</u>
20200	<u>DISEASE CONTROL - GENERAL</u> (Continued)			
-30	Disease control speaking notes and presentation materials	SO	nil	DE

SO = when information is no longer current

NOTE: Please notify the Information Analysis and Scheduling Section of IDMB before disposing of any files which contain audio-visual aids, sound recordings, photographs, motion pictures, etc.

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

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week m = month
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			<u>A</u>	<u>SA</u>	<u>FD</u>
20210	<u>DISEASE CONTROL - OUTBREAK INVESTIGATION</u>				
	Records relating to investigations into outbreaks of communicable diseases and incidents of food-poisoning according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes correspondence, memoranda, reported cases of diseases, outbreak questionnaires, and reports on the findings of investigations.				
	For communicable disease surveillance reports, see primary 20280.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Outbreak investigation case files (arrange alphabetically by disease, then by location)		SO+1y	25y	SR
	SO = upon completion of the investigation final report				
	26y = This will ensure records are retained until the expiration of the right (including the right of minors) to initiate a legal action specified under the <i>Limitation Act</i> (RSBC 1996, c. 266, s.3). The additional year is allowed for the serving of notice on all parties.				

(Continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

20210 DISEASE CONTROL - OUTBREAK INVESTIGATION

(Continued)

SR = The government archives will selectively retain outbreak investigation files for their evidential and informational value. In consultation with the staff of Communicable Disease Control Services, IDMB will select those outbreak investigation files that document significant, unusual and/or precedent setting outbreak investigations. In addition IDMB will select every 25th file. At the time of transfer of these records to semi-active storage, the staff of Communicable Disease Control Services will indicate on the file list which files, in their opinion, should be retained permanently at the end of their semi-active retention period.

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
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20240	<u>DISEASE CONTROL - ISSUES, REPORTS AND STUDIES</u>				
	Records relating to research into public health issues and communicable diseases according to the <i>Health Act</i> (RSBC 1996, c. 179). This includes records relating to one-time as well as on-going issues, and the publication of research articles. Includes statistics, reports, reference material, manuscripts, correspondence and memoranda.				
	For epidemiologic surveillance, see primary 20280.				
	For immunization programs, see primary 20450.				
	For outbreak investigation, see primary 20210 and 21700.				
	For research into sexually transmitted diseases, see primary 22800.				
	For research into tuberculosis, see primary 23700.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Disease control issues, reports and studies		SO	nil	FR
	SO =	when information is no longer current			

(Continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

20240 DISEASE CONTROL - ISSUES, REPORTS AND STUDIES

(Continued)

FR = The government archives will fully retain disease control issues, studies and reports for their residual evidential and informational value. These files document issues and research of considerable scientific and public interest.

-30	Disease control reference materials (includes research articles and abstracts collected from external sources)	SO	nil	DE
-----	---	----	-----	----

SO = when information is no longer current

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CY = Calendar Year
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			<u>A</u>	<u>SA</u>	<u>FD</u>
20260	<u>DISEASE CONTROL - STANDARDS AND GUIDELINES</u>				
	Records relating to the development and review of standards and guidelines issued to public health service providers for the management and control of communicable diseases according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes policy manuals and circulars, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Disease control policy circulars		CY+4y	10y	FR
	15y = This retention period ensures that the records are maintained for consultation, review and analysis.				
	FR = The government archives will fully retain policy circulars for their residual evidential and informational value. These records document policy for how public health providers manage and control communicable diseases in the province.				
-03	Communicable disease control manual		SO+5y	10y	FR
	SO = when new or revised standards and guidelines are issued				

(Continued on next page)

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A SA FD

20260 DISEASE CONTROL - STANDARDS AND GUIDELINES

(Continued)

15y = This retention period ensures that the records are maintained for consultation, review and analysis.

FR = The government archives will fully retain one copy of each communicable disease control manual for its residual evidential and informational value. The manual documents policy for the management and control of communicable diseases in the province.

-20 Communicable disease control manual development files
(arrange alphabetically by subject)

SO+1y 2y DE

SO = when new or revised standards and guidelines are issued

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20280	<u>DISEASE CONTROL - SURVEILLANCE</u>				
	Records relating to monitoring and reporting communicable diseases in the province according to the <i>Health Act</i> (RSBC 1996, c. 179) and the <i>Health Act Communicable Disease Regulations</i> (B.C. Reg. 4/83). Includes correspondence, memoranda, and case files.				
	For communicable disease case report in field offices, see the <i>Community Health Programs ORCS</i> .				
	For surveillance of adverse reactions to immunizing agents, see primary 20420.				
	For surveillance of AIDS, see primary 22100.				
	For surveillance of tuberculosis, see primary 23200.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Communicable disease case reports (arrange alphabetically by disease)		SO	nil	DE
	SO = upon verification of entry into the Communicable Disease Surveillance System				
-03	Communicable Disease Surveillance System (CDSS) Epidemiology Section (electronic database)		SO	nil	DE
	SO = when database is superseded or obsolete and information has been migrated to a new format				

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
20280	<u>DISEASE CONTROL - SURVEILLANCE</u> (Continued)			
	NOTE: For more information about the CDSS Epidemiology Section, see the Information System Overview.			
-04	Communicable Disease Surveillance System (CDSS) Field Section (electronic database)	SO	nil	DE
	SO = when database is superseded or obsolete and information has been migrated to a new format			
	NOTE: For more information about the CDSS Field Section, see the Information System Overview.			
-05	CDSS edit logs (arrange by health unit)	CY+2y	4y	DE
-06	CDSS statistical reports - weekly	1w	nil	DE
-07	CDSS statistical reports - monthly	CY	nil	FR
	FR = The government archives will fully retain one copy of each monthly statistical report for its significant informational value. These records summarize all incidents of communicable diseases in the province.			
	NOTE: Ad hoc or special request reports are transitory documents if they are stamped "copy" upon production.			
-08	Influenza surveillance system (ISS) (electronic database)	SO	nil	DE
	SO = when database is superseded or obsolete and information has been migrated to a new format			

(Continued on next page)

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A SA FD

20280 DISEASE CONTROL - SURVEILLANCE (Continued)

NOTE: For more information about the ISS, see the
Information System Overview.

-09 Surveillance data - other jurisdictions CY nil DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20400	<u>IMMUNIZATION - GENERAL</u>				
	Records relating generally to immunization not shown elsewhere in this primary block. This includes records relating to the release of emergency biological products. Includes correspondence, memoranda, reports and reference material.				
	For immunization adverse reactions, see primary 20450.				
	For immunization programs, see primary 20420.				
	For individuals' immunization records, see the <i>Community Health Programs ORCS</i> .				
	For procurement and distribution of biological products, see primary 20630.				
	For vaccine manufacturer information, see primary 20600.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		SO	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01 General				
	-02 Immunization contra-indications				
	-03 Immunization of school children				
	-04 Immunization status in British Columbia				
	-05 Immunization techniques				
PIB	-20 Release of emergency biological products case files (arrange alphabetically by client name)		CY+1y	25y	DE

(Continued on next page)

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A SA FD

20400 IMMUNIZATION - GENERAL (Continued)

26y = This will ensure records are retained until the expiration of the right (including the right of minors, upon reaching the age of majority) to initiate a legal action specified under the *Limitation Act* (RSBC 1996, c.266). The additional year is allowed for the serving of notice on all parties.

DE = Release of emergency biological products case files will be destroyed at the end of their semi-active retention period. These files contain minimal information on who received emergency biological products. Their value is not sufficient to justify the cost of selecting and preserving them.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20420	<u>IMMUNIZATION - ADVERSE REACTIONS TO IMMUNIZING AGENTS</u>				
	Records relating to the surveillance of adverse reactions to immunizing agents reported by provincial health units, and consultation with medical health officers concerning these adverse reactions. Includes adverse reaction report forms (HLTH 2319), related correspondence and memoranda, and electronic database records.				
	For immunization programs, see primary 20450.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
		- <u>non-OPR</u>			
	-01	General			
PIB	-02	Adverse reaction surveillance reports (includes HLTH 2319) (arrange alphabetically by patient name)	CY+1y	5y	DE
	-03	Adverse reaction surveillance reports and interpretations (arrange chronologically by month, then alphabetically)			
PIB	-04	Adverse reaction system (ARS) (electronic database)	SO	nil	DE
	SO =	when database is superseded or obsolete and information has been migrated to a new format			

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
20420	<u>IMMUNIZATION - ADVERSE REACTIONS TO IMMUNIZING AGENTS</u> (Continued)			
	NOTE: For more information on the ARS, see the Information System Overview.			
-05	ARS statistical reports - annual	CY+2y	nil	FR
	FR = The government archives will fully retain one copy of each ARS statistical report for its residual informational value. These reports have considerable scientific value as they summarize all incidents in the province of adverse reactions to immunizing agents.			
	NOTE: Ad hoc or special request reports are transitory documents if they are stamped "copy" upon production.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20450	<u>IMMUNIZATION - PROGRAMS AND PROGRAM MONITORING</u>				
	Records relating to the development and implementation of immunization programs, the introduction of new immunizing agents, and immunization program development according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes correspondence, memoranda, reports and statistics.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Immunization program development files (arrange alphabetically by disease/immunizing agent)		SO+2y	5y	DE
	SO = when program has been implemented or abandoned				
-30	Immunization program implementation strategies (arrange alphabetically by disease/immunizing agent)		SO+5y	5y	FR
	SO = when program has been implemented				
	10y = This ensures the records are retained for program analysis and review.				

(Continued on next page)

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A SA FD

20450 IMMUNIZATION - PROGRAMS AND PROGRAM
MONITORING (Continued)

FR = The government archives will fully retain
immunization program implementation
strategies for their residual evidential and
research value. These records document
strategies for immunization against
communicable diseases in the province.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20600	<u>BIOLOGICAL PRODUCTS - GENERAL</u>				
	Records relating generally to the supply and quality of biological products, as specified by the <i>Health Act</i> (RSBC 1996, c. 179), which are not shown elsewhere in this primary block. Includes correspondence, memoranda, statistics, reports and supplier information.				
	For procurement and distribution of biological products, see primary 20630.				
	For reports of adverse reactions to immunizing agents, see primary 20420.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		FY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Vaccine cost analysis				
-03	Vaccine handling and stability				
-04	Vaccine usage reports				
-05	Vaccine wastage				
-20	Vaccine manufacturer product information (arrange alphabetically by name of supplier)		SO	nil	DE
	SO = when information is no longer required for reference purposes				

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20630	<u>BIOLOGICAL PRODUCTS - PROCUREMENT AND DISTRIBUTION</u>				
	Records relating to the procurement and distribution of biological products to hospitals, health units, correctional institutions, schools and other client agencies according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes correspondence, memoranda, requisition forms (HLTH 67, 67A and 2315), invoices, reports, and delivery confirmation slips.				
	For contracts with distributors, see ARCS primary 1080.				
	For distribution of pharmaceutical products, see primary 20800 to 20900.				
	For immunization programs, see primary 20450.				
	For product information, see primary 20600.				
	For release of emergency biologicals, see primary 20400 and 21300.				
	Unless otherwise specified below, the ministry OPR (Communicable Disease Epidemiology Services) will retain these records for:		FY+1y	5y	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>FY+1y</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Biological products requisitions (includes requisition forms) (arrange chronologically)				
-03	Biological products distribution (includes delivery confirmations, client invoices and distributor inventory) (arrange chronologically)				

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
20630	<u>BIOLOGICAL PRODUCTS - PROCUREMENT AND DISTRIBUTION</u> (Continued)			
-04	Biological products management system (BPMS) (electronic database)	SO	nil	DE
	SO = when database is superseded or obsolete and information has been migrated to a new format			
	NOTE: For more information on the BPMS, see the Information Systems Overview.			
-05	Combination vaccines			
-06	Emergency biological products			
-07	Travel vaccines			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
20800	<u>PHARMACY SERVICES - GENERAL</u>				
	Records not shown elsewhere in this primary block which relate generally to pharmacy services in support of disease control programs of the B.C. Centre for Disease Control and Kidney Dialysis Services. Includes correspondence, memoranda and client registries.				
	Unless otherwise specified below, the ministry OPR (Pharmacy Services) will retain these records for:				
			CY+1y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:				
			<u>SO</u>	<u>nil</u>	<u>DE</u>
	-00	Policy and procedures	SO	5y	FR
		- OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
		- <u>non-OPR</u>			
	-01	General			
PIB	-02	Hemophilia program patient registry	SO	nil	DE
PIB	-03	Hemosiderosis program patient registry			
PIB	-04	Leprosy program patient registry			
PIB	-05	Renal program patient registry			
PIB	-06	Rheumatic fever program patient registry			

SO = when the registry is cancelled

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A SA FD

20900 PHARMACY SERVICES - PATIENT MEDICATION

Records relating to the dispensing of pharmaceutical products in support of disease control programs of the B.C. Centre for Disease Control and Kidney Dialysis Services as specified by the *Pharmacists, Pharmacy Operations and Drug Scheduling Act* (RSBC 1996, c. 363), and the by-laws of the Council of the College of Pharmacists of B.C. (B-19 "Standards of Pharmaceutical Practice" (5), a,c). Includes authorizations to dispense investigational drugs, prescriptions/drug requisition forms, shipping manifests, patient prescription information and electronic database records.

For procurement and distribution of biological products, see primary 20630.

For purchase orders, see ARCS primary 835.

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

CY+1y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Dispensary authorizations for investigational drugs				
-03	Hemophilia program patient medication files (arrange chronologically)		CY+1y	5y	DE
-04	Hemosiderosis program patient medication files (arrange chronologically)		CY+1y	5y	DE
-05	Leprosy program patient medication files (arrange chronologically)		CY+1y	5y	DE

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
20900	<u>PHARMACY SERVICES - PATIENT MEDICATION</u> (Continued)			
-06	Renal program patient medication files (arrange chronologically)	CY+1y	5y	DE
-07	Sexually transmitted disease patient medication files (arrange chronologically)	CY+1y	5y	DE
-08	Tuberculosis patient medication files (arrange chronologically)	CY+1y	5y	DE
PIB	-09 Pharmacy System (electronic database)	SO	nil	DE

ISO = when database is superseded or obsolete and
information has been migrated to a new format

NOTE: For more information on the Pharmacy System,
see the Information System Overview.

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A SA FD

SECTION 2

PROVINCIAL LABORATORY SERVICES

PRIMARY NUMBERS

21000 - 21999

Section 2 covers records relating to public health, diagnostic and reference microbiology testing; consultation; and research and development services to investigate, diagnose and control communicable diseases and respond to environmental health problems according to the *Health Act* (RSBC 1996, c. 179) and the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83). This includes records relating to laboratory testing for diseases caused by communicable agents and related services such as immunology, parasitology, serology and environmental microbiology.

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A SA FD

21000 - PROVINCIAL LABORATORY SERVICES - 21999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

21000	PROVINCIAL LABORATORY SERVICES - GENERAL
21100	LABORATORY SERVICES - GENERAL
21110	- ENTERIC BACTERIOLOGY
21120	- FOOD-BORNE DISEASES
21130	- GENERAL BACTERIOLOGY
21140	- MYCOBACTERIOLOGY
21150	- MYCOLOGY
21160	- PARASITOLOGY
21170	- SEROLOGY
21180	- VECTOR-BORNE DISEASES
21190	- VIROLOGY
21195	- WATER BACTERIOLOGY
21200	LABORATORY SUPPLIES AND SUPPORT
21300	MEDICAL MICROBIOLOGY REFERRALS AND CONSULTATIONS
21400	MICROBIOLOGY ISSUES, REPORTS AND STUDIES
21600	PERFORMANCE EVALUATION AND ACCREDITATION
21700	PUBLIC HEALTH RESEARCH PROJECTS
21800	DISEASE DIAGNOSIS RESEARCH AND DEVELOPMENT

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21000	<u>PROVINCIAL LABORATORY SERVICES - GENERAL</u>				
	Records not shown elsewhere in the provincial laboratory services section which relate generally to diagnostic testing and related services in the control of communicable diseases, according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes correspondence, reports and memoranda.				
	NOTE: Only records which cannot be classified in a more specific primary or secondary may be classified under this primary.				
	Unless otherwise specified below, the ministry OPR (Provincial Laboratory Division) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	FR = The government archives will fully retain all policy and procedure files created by offices having primary responsibility for policy and procedure development and approval for their evidential value. Draft and duplicate materials which hold no evidential value may be purged and discarded.				
-01	General				
-02	Annual reports		CY+2y	5y	FR
	FR = The government archives will fully retain one copy of each annual report from the director's office of the Provincial Laboratory for its significant evidential and informational value in summarizing in a comprehensive manner all areas of the agency's work.				

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A SA FD

21100 LABORATORY SERVICES - GENERAL

Records relating generally to laboratory services not shown elsewhere in this primary block. This includes statistical operating reports, reporting test results to clients, and maintaining patient, physician and client/submitter records which are linked to the specimen records produced in each laboratory section. Includes database files, reports, and related correspondence and memoranda.

For annual reports, see ORCS primary 21000.

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

CY+1y nil DE

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

SO nil DE

	-00	Policy and procedures	- OPR	SO	5y	FR	
			- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>	-01
PIB	-02	Laboratory System (electronic database)		SO	nil	DE	

SO = when database is superseded or obsolete and information has been migrated to a new format

NOTE: For more information on the Laboratory System, see the Information System Overview.

	-03	Laboratory system statistical reports					
PIB	-04	Laboratory specimen testing results		FY+1y	6y	DE	
	-05	Undeliverable laboratory specimen testing results					

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		<u>A</u>	<u>SA</u>	<u>FD</u>
21110	<u>LABORATORY SERVICES - ENTERIC BACTERIOLOGY</u>			
	Records relating to the isolation, identification and/or serotyping of enteric pathogens from patient and non-human specimens as well as referred cultures isolated in other laboratories according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes requisition forms, work cards and work sheets, reports, outbreak investigations, and related correspondence and memoranda.			
	Unless otherwise specified below, the ministry OPR (Enteric Bacteriology Section, Provincial Laboratory) will retain these records for:	FY+1y	5y	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	<u>SO</u>	<u>5y</u>	<u>DE</u>
-01	General			
-02	Enteric bacteriology test requisitions (arrange by specimen/referral type, then chronologically)			
-03	Enteric bacteriology work cards (arrange chronologically)			
-04	Enteric bacteriology worksheets (arrange by accession number)			
-05	Non-human specimen/referral accession log			
-06	National Reference Centres reports	SO	nil	DE
	SO = when no longer required for reference purposes			

(Continued on next page)

21110 LABORATORY SERVICES - ENTERIC

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		<u>A</u>	<u>SA</u>	<u>FD</u>
	<u>BACTERIOLOGY</u> (Continued)			
-07	Organism serotype incidence reports	SO	nil	DE
	SO = when no longer required for reference purposes			
-20	Diarrheal disease outbreak investigation files (arrange first alphabetically by health unit, then chronologically)	SO+1y	6y	DE
	SO = upon completion of the investigation			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21120	<u>LABORATORY SERVICES - FOOD-BORNE DISEASES</u>				
	Records relating to the identification of etiological agents in the investigation of cases of food poisoning, including botulism, according to the <i>Health Act</i> (RSBC 1996, c. 179). This also includes records relating to the Food Quality Check program which tests submitted samples of ready-to-eat foods from food service establishments for sanitary quality. Includes food poisoning outbreak investigation case files, food poisoning reporting notebooks, food sample requisitions, reports, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Environmental Bacteriology Section, Provincial Laboratory) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	<i>Bacillus thuringiensis var. kurstaki</i> (Btk) pesticide testing				
-03	Food poisoning laboratory diary		FY+1y	5y	DE
-04	Food poisoning laboratory telephone logs		FY+1y	5y	DE
-05	Food poisoning test worksheets (arrange by month, then by FP number)		FY+1y	5y	DE
-06	Food quality check requisitions and reports		FY+1y	5y	DE
-07	Food quality check worksheets (arrange chronologically by month)		FY+1y	5y	DE
-20	Food-borne botulism case files (arrange first alphabetically by health unit, then chronologically)		SO+1y	25y	DE

(Continued on next page)

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A SA FD

21120 LABORATORY SERVICES - FOOD-BORNE DISEASES

(Continued)

SO = upon completion of the investigation

26y = This will ensure records are retained until the expiration of the right (including the right of minors) to initiate a legal action specified under the *Limitation Act* (RSBC 1996, c. 266). The additional year is allowed for the serving of notice on all parties.

-25 Infant botulism case files SO+1y 25y DE
(arrange first alphabetically by health unit, then chronologically)

SO = upon completion of the investigation

26y = This will ensure records are retained until the expiration of the right of minors, upon reaching the age of majority, to initiate a legal action specified under the *Limitation Act* (RSBC 1996, c. 266). The additional year is allowed for the serving of notice on all parties.

-30 Food poisoning outbreak investigations SO+1y 25y DE
(arrange first alphabetically by health unit, then chronologically)

SO = upon completion of the investigation

26y = This will ensure records are retained until the expiration of the right (including the right of minors) to initiate a legal action specified under the *Limitation Act* (RSBC 1996, c. 266, s.3). The additional year is allowed for the serving of notice on all parties.

(Continued on next page)

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21120 LABORATORY SERVICES - FOOD-BORNE DISEASES

(Continued)

DE = Food botulism case files, Infant botulism case files, and Food poisoning case files will be destroyed at the end of their semi-active retention period. The information in these detailed and technical reports is sufficiently summarized in the Provincial Laboratory Services annual report, and the records do not have sufficient evidential or informational value to justify the cost of selecting and preserving them.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21130	<u>LABORATORY SERVICES - GENERAL BACTERIOLOGY</u>				
	Records relating to the provision of laboratory services for the diagnosis of upper respiratory infections, sexually transmitted diseases, and the isolation and identification of other bacteriological pathogens according to the <i>Health Act</i> , (RSBC 1996, c. 179). Includes requisition forms, work cards, worksheets, reference reports, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (General Bacteriology Section, Provincial Laboratory) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	General bacteriology test requisitions (arrange by specimen series type)		FY+1y	6y	DE
-03	General bacteriology work cards (arrange by requisition number)		FY+1y	6y	DE
-04	General bacteriology worksheets		FY+1y	6y	DE
-05	General bacteriology referred specimen reports		FY+1y	6y	DE
-06	General bacteriology sensitivity testing results		FY+1y	nil	DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21140	<u>LABORATORY SERVICES - MYCOBACTERIOLOGY</u>				
	Records relating to the examination and culture of specimens for the isolation and identification of <i>M. tuberculosis</i> (TB) and mycobacteria other than tuberculosis (MOTT) according to the <i>Health Act</i> (RSBC 1996, c. 179). This includes testing isolates for susceptibility to antimicrobial agents as a guide to therapy. Includes requisition forms HLTH 1869, worksheets, logbooks, drug susceptibility test reports, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Mycobacteriology Section, Provincial Laboratory) will retain these records for:				
			FY+1y	6y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		FY+2y	2y	DE
-02	Mycobacteriology test requisitions (arrange by series, then numerically)				
-03	Mycobacteriology worksheets (arrange by series, then numerically)				
-04	Mycobacteriology positive smear sheets (arrange chronologically)				
-05	Culture for identification log				
-06	BACTEC (Rapid radiometric method sensitivity testing) isolation worksheets (arrange by series, then chronologically)				
-07	BACTEC output tapes				
-08	NAP worksheets (arrange chronologically)				

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
21140	<u>LABORATORY SERVICES - MYCOBACTERIOLOGY</u> (Continued)			
-09	TB and MOTT sensitivity worksheets			
-10	MOTT identification worksheets			
-11	Gen-Probe worksheets			
-12	Reference laboratory reports - Laboratory Centre for Disease Control	SO	nil	DE
-13	Reference laboratory reports - other laboratories	SO	nil	DE
-14	Reference cultures (includes culture lists, characteristics, and source information)	SO	nil	DE
SO =	when no longer required for reference purposes			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21150	<u>LABORATORY SERVICES - MYCOLOGY</u>				
	Records relating to the isolation and identification and/or verification of fungal organisms in submitted specimens and cultures according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes requisition forms HLTH 1815, worksheets, reference reports, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Mycology Section, Provincial Laboratory) will retain these records for:		FY+1y	6y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General		FY+1y	2y	DE
-02	Mycology test requisitions (arrange by series, then numerically)				
-03	Mycology worksheets (arrange by series, then numerically)				
-04	Mycology positive sheets (arrange chronologically)				
-05	Culture for identification worksheets				
-06	Mycology reference lab reports - Alberta		SO	nil	DE
-07	Mycology reference lab reports - other labs		SO	nil	DE
-08	Mycology reference cultures (includes culture lists, culture characteristics, and source information)		SO	nil	DE
SO =	when no longer required for reference purposes				

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21160	<u>LABORATORY SERVICES - PARASITOLOGY</u>				
	Records relating to the provision of diagnostic and reference testing services for the identification of protozoan parasites, worms and insects in submitted faecal, blood and tissue specimens according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes test requisition forms HLTH 1808, 1808A and 1890, worksheets, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Parasitology Section, Provincial Laboratory) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Parasitology examinations - negative results (includes requisition forms)		FY	7y	DE
-03	Parasitology examinations - positive results (arrange by series, then by requisition number)		FY+7y	nil	DE
-04	Parasitology worksheets		FY	7y	DE
-05	Anal swabs for pinworms ledger sheets		FY+1y	6y	DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21170	<u>LABORATORY SERVICES - SEROLOGY</u>				
	Records relating to diagnostic testing for non-viral agents and consultative services in non-viral serology according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes requisition forms, worksheets, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Serology Section, Provincial Laboratory) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Serology test requisitions (arrange by series, then chronologically)		FY+1y	5y	DE
-03	Serology worksheets		FY+1y	5y	DE
-04	Serology reference laboratory reports		SO	nil	DE
	SO = when no longer required for reference purposes				

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21180	<u>LABORATORY SERVICES - VECTOR-BORNE DISEASES</u>				
	Records relating to diagnostic, consultative and research services in vector-borne diseases according to the <i>Health Act</i> (RSBC 1996, c. 179). This includes records relating to the collection, culture, and examination of specimens for such vector-borne diseases as Lyme disease and Hantavirus to determine their presence and distribution in the province, as well as diagnostic and reference services for these diseases in humans and animals. Includes test requisitions and results, culture books, reports, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Vector-borne Diseases Section, Provincial Laboratory) will retain these records for:				
			CY+2y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Veterinary requisitions and test results		FY+1y	6y	DE
-03	Veterinary results log book		FY+1y	nil	DE
-04	Specimen collection data		SO	nil	DE
	SO = when no longer required for reference purposes				
-05	Specimen collection statistical reports		SO	nil	DE
	SO = when report is no longer required for reference purposes				
-06	Culture worksheets - hantavirus		FY+5y	10y	DE
-07	Culture worksheets - human references		FY+5y	10y	DE
-08	Culture worksheets - rodent cultures		FY+5y	10y	DE
-09	Culture worksheets - tick cultures		FY+5y	10y	DE
-10	Reference reports - human		FY+5y	10y	DE

(Continued on next page)

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21180	<u>LABORATORY SERVICES - VECTOR-BORNE DISEASES</u> (Continued)			
-11	Reference reports - tick	FY+5y	10y	DE
15y =	For secondaries -06 to -11 the combined active and semi-active retention periods are required for research and evaluation purposes.			
DE =	The records in secondaries 21180-06 to 21180-11 will be destroyed at the end of their semi-active retention period. The information in these detailed and technical records is sufficiently summarized in the Provincial Laboratory Services annual report, and the records do not have sufficient evidential or informational value to justify the cost of selecting and preserving them.			

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21190	<u>LABORATORY SERVICES - VIROLOGY</u>				
	Records relating to diagnostic and consultative services in medical virology according to the <i>Health Act</i> (RSBC 1996, c. 179). This includes the examination and culture of specimens for the isolation and identification of viruses, including rubella, hepatitis, and human immunodeficiency virus (HIV), among others. Includes requisition forms HLTH 1802, 1809, 1810, 1811 and 1812, worksheets, and related correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Virology Section, Provincial Laboratory) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Virology test requisitions (arrange by series, then by requisition number)		FY+1y	5y	DE
-03	Virology worksheets (arrange by series, then chronologically)		FY+1y	nil	DE
-04	HIV statistical reports - monthly		FY+1y	nil	DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21195	<u>LABORATORY SERVICES - WATER BACTERIOLOGY</u>				
	Records relating to bacteriological analysis of water samples to determine sanitary quality. This includes routine testing for drinking water, bathing beach and swimming pool safety, sewage and sewage contaminated water, as well as testing for etiological agents of water-borne disease outbreaks according to the <i>Health Act</i> (RSBC 1996, c. 179). Includes test requisitions, worksheets, logbooks, and related correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Environmental Bacteriology Section, Provincial Laboratory) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Water bacteriology test requisitions		SO	nil	DE
	SO = when test results are reported to client				
-03	Water bacteriology test results		FY+1y	6y	DE
-04	Water bacteriology positive sample register		FY+1y	6y	DE

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A SA FD

21200 LABORATORY SUPPLIES AND SUPPORT

Records relating to the provision of technical support services to provincial laboratory staff. This includes records relating to the preparation of culture media and specimen receiving. Includes requisitions, worksheets, shipping manifests and related correspondence and memoranda.

For disposal of medical waste, see ARCS primary 660.

For laboratory equipment history files, see ARCS primary 785.

For laundry services, see ARCS primary 735.

For procurement of equipment and supplies, see ARCS primaries 825 to 847.

For quality control, see primary 21600.

Unless otherwise specified below, the ministry OPR (Technical Support Section, Provincial Laboratory) 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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Chemical supply inventory				
-03	Culture media requisitions				
-04	Culture media worksheets				
-05	Specimen shipping manifests		CY	2y	DE

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		<u>A</u>	<u>SA</u>	<u>FD</u>	
21300	<u>MEDICAL MICROBIOLOGY REFERRALS AND CONSULTATIONS</u>				
	Records relating to the provision of expert medical advice to health practitioners and other government staff regarding the laboratory diagnosis and treatment of communicable diseases, including the delivery of lectures and workshops. Includes lecture notes and presentation materials, telephone consultation logs, correspondence with other physicians and memoranda.				
	Unless otherwise specified below, the ministry OPR (Provincial Laboratory Division) will retain these records for:	CY+1y	2y	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	5y	FR	
	- OPR	SO	5y	FR	
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>	-01
-02	Emergency biologicals release and recommendations	CY+1y	5y	DE	
-03	Lecture notes and presentation materials	SO	nil	DE	
	NOTE: Please notify IDMB before disposing of any files which contain audio-visual aids, sound recordings, photographs, motion pictures, etc.				
-04	Medical consultations on problem case files	CY+1y	6y	DE	
-05	Telephone consultation logs	CY+1y	6y	DE	

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			<u>A</u>	<u>SA</u>	<u>FD</u>
21400	<u>MICROBIOLOGY ISSUES, REPORTS AND STUDIES</u>				
	Records relating to issues in the laboratory diagnosis of disease. This includes records relating to the evaluation of laboratory methodologies, evaluation of antimicrobial agents as a guide to therapy, and the publication of research articles and abstracts. Includes statistics, reports, reference material, manuscripts, correspondence and memoranda.				
	For reports on workloads, see ARCS primaries 444 to 446.				
	Unless otherwise specified below, the ministry OPR (Provincial Laboratory Division) will retain these records for:		FY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Antibiotics studies and projects (arrange alphabetically by antibiotic)		SO	nil	DE
-30	Laboratory test evaluations (arrange alphabetically by laboratory methodology)		SO	nil	DE
-40	Microbiology reference files (includes literature, reference material and related correspondence and memoranda) (arrange alphabetically by subject)		SO	nil	DE
-50	Microbiology research articles and abstracts (includes draft manuscripts) (arrange alphabetically by title)		SO	nil	FR

(Continued on next page)

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A SA FD

21400 MICROBIOLOGY ISSUES, REPORTS AND STUDIES

(Continued)

FR = The government archives will fully retain microbiology research articles and abstracts for their significant evidential and informational value. These records document original research by the staff of the provincial laboratory into the laboratory diagnosis of communicable diseases.

-60	Microbiology annual report data (includes raw data, statistical summaries, culture isolates summaries, unusual isolate data including patient case histories, and other project information)	SO	nil	DE
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			<u>A</u>	<u>SA</u>	<u>FD</u>
21600	<u>PERFORMANCE EVALUATION AND ACCREDITATION</u>				
	Records relating to proficiency testing and laboratory accreditation programs administered by outside agencies as well as internal quality control monitoring of media, reagents and procedures to ensure proper performance in the isolation and identification of microbial pathogens. Includes College of American Pathologists (CAP) surveys, proficiency tests and results, quality control logs, reports, correspondence and memoranda.				
	Unless otherwise specified below, the ministry OPR (Provincial Laboratory Division) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Laboratory accreditation files		SO+3y	7y	DE
	SO = when accreditation is renewed, revoked or abandoned				
	10y= This retention period ensures that accreditation program records are retained for analysis and review.				
-03	Quality control logbooks		FY+2y	4y	DE
-20	Proficiency testing programs and results (arrange by test)		SO+3y	7y	DE
	SO = when accreditation is renewed, revoked or abandoned				

(Continued on next page)

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A SA FD

21600 PERFORMANCE EVALUATION AND ACCREDITATION

(Continued)

10y= This retention period ensures that proficiency testing records are retained for analysis and review.

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A SA FD

21700 PUBLIC HEALTH RESEARCH PROJECTS

Records relating to special investigations into communicable diseases (including parasites such as *Giardia* and *Cryptosporidium*) to better understand their epidemiology of transmission; to develop methodologies for the isolation and identification of pathogens; and to develop strategies for prevention or control according to the *Health Act* (RSBC 1996, c. 179). This includes projects which may be funded and administered in part by outside agencies. Includes test requisitions and results, lab diaries, culture logbooks, strain typing, outbreak investigations, reports, correspondence and memoranda.

For research and development of laboratory test evaluation
see primary 21400.

For research articles and abstracts, see primary 21400.

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

CY+1y 2y 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 - non-OPR
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SO	5y	FR
SO	nil	DE

-01 General

-02 Specimen test requisitions and results

CY+5y 10y DE

15y= This ensures that records are retained for an appropriate period for research and analysis.

-03 Culture logbooks

CY+5y 10y DE

15y= This ensures that records are retained for an appropriate period for research and analysis.

(Continued on the next page)

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21700	<u>PUBLIC HEALTH RESEARCH PROJECTS</u> (Continued)			
-04	Laboratory diaries	CY+5y	10y	DE
	15y= This ensures that records are retained for an appropriate period for research and analysis.			
DE =	The records in secondaries 21700-02 to -04 will be destroyed at the end of their semi-active retention period as they contain detailed and technical information that does have sufficient evidential or informational value to justify the cost of selecting and preserving them. The functions documented in these records are sufficiently documented in Outbreak investigation files (20210-20 – selectively retained), Provincial Laboratory Services annual report (21000-02 - fully retained) and in Disease diagnosis research and development project files (21800-20 – fully retained).			
-05	Infectivity testing and strain typing	SO	nil	DE
	SO = when no longer required for reference purposes			
-06	Public health research project summary reports	FY+1y	2y	DE
-20	Disease outbreak investigations (arrange alphabetically by disease, then by location)	SO+1y	6y	DE
	SO = when the investigation is complete			

(Continued on next page)

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A SA FD

21700 PUBLIC HEALTH RESEARCH PROJECTS (Continued)

DE = Disease outbreak investigation files will be destroyed at the end of their semi-active retention period. They document the same incidents that are documented in Outbreak investigation case files (20210-20), but from the point of view of laboratory services. These incidents are sufficiently documented by selective retention of Outbreak investigation case files and full retention of summary information in Provincial Laboratory Services annual reports (21000-02).

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		<u>A</u>	<u>SA</u>	<u>FD</u>
21800	<u>DISEASE DIAGNOSIS RESEARCH AND DEVELOPMENT</u>			
	Records relating to research and development of new methodologies for detecting and/or typing pathogens for use in the laboratory diagnosis of diseases. Includes test requisitions and specimen results for the development of tests, lab notes, correspondence and memoranda.			
	For research articles and abstracts, see primary 21400.			
	Unless otherwise specified below, the ministry OPR (Applied Research and Development Section, Provincial Laboratory) will retain these records for:	CY+1y	2y	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	5y	FR
	- OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
	- <u>non-OPR</u>			
-01	General			
-02	Research specimen requisitions and test results			
-20	Disease diagnosis research and development project files (arrange by alphabetically by project name)	SO	nil	FR
	SO = when the project is completed or abandoned			
	FR = The government archives will fully retain disease diagnosis research and development project files for their residual evidential and informational value. These records document significant and original research by Communicable Disease Control Services staff.			

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A SA FD

SECTION 3

SEXUALLY TRANSMITTED DISEASES/ AIDS CONTROL SERVICES

PRIMARY NUMBERS

22000 - 22999

Section 3 covers records relating to the prevention and control of sexually transmitted diseases (STDs), including Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome (HIV/AIDS), according to the *Health Act* (RSBC 1996, c. 179), the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83), and the *Venereal Disease Act* (RSBC 1996, c. 475). This includes records relating to: screening, diagnosis and treatment of individuals with sexually transmitted diseases and their contacts; surveillance of STDs and AIDS; applied research; consultation with health practitioners and the public concerning the control and treatment of STDs and AIDS; professional and public education about STDs and AIDS; and the development of programs to combat STDs and AIDS.

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FOI = Freedom of Information/Privacy
VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

22000 - SEXUALLY TRANSMITTED DISEASES/AIDS CONTROL SERVICES - 22999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

22000 SEXUALLY TRANSMITTED DISEASES/AIDS CONTROL SERVICES - GENERAL

22100 EPIDEMIOLOGIC SURVEILLANCE OF SEXUALLY TRANSMITTED DISEASES

22300 PATIENT EXAMINATION AND TREATMENT

22500 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS - GENERAL

22520	- B.C. NATIVE AIDS AWARENESS PROGRAM
22550	- EDUCATION AND TRAINING PROGRAMS

22700 REFERENCE AND CONSULTATION ON SEXUALLY TRANSMITTED
DISEASES

22800 CLINICAL RESEARCH AND INVESTIGATIONS

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
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22000 SEXUALLY TRANSMITTED DISEASES/AIDS CONTROL SERVICES - GENERAL

Records not shown elsewhere in the sexually transmitted diseases/AIDS control services section which relate generally to the prevention and control of sexually transmitted diseases, including the Human Immunodeficiency Virus (HIV) and Acquired Immune Deficiency Syndrome (AIDS), according to the *Health Act* (RSBC 1996, c. 179), the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83), and the *Venereal Disease Act* (RSBC 1996, c.475). Includes memoranda and correspondence.

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

Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:

CY+1y 2y DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				

4y = This ensures primary operational requirements of the creating agency are met.

FR = The government archives will fully retain all policy and procedure files created by offices having primary responsibility for policy and procedure development and approval for their evidential value. Draft and duplicate materials which hold no evidential value may be purged and discarded.

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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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

22100 EPIDEMIOLOGIC SURVEILLANCE OF SEXUALLY TRANSMITTED DISEASES

Records relating to reporting and monitoring the incidence of sexually transmitted diseases (STDs) and Acquired Immune Deficiency Syndrome (AIDS) in British Columbia according to the *Health Act* (RSBC 1996, c. 179), and the *Health Act Communicable Disease Regulation* (B.C. Reg 4/83). This includes researching and reporting the incidence of STDs and AIDS, maintaining a registry of AIDS cases in the province, and reporting provincial AIDS cases to the National Surveillance Program for Acquired Immunodeficiency Syndrome, coordinated by Health and Welfare Canada. Includes notification forms HPB 5124 and HPB 5110, gonorrhea surveillance forms, chlamydia surveillance forms, research data, correspondence and memoranda.

For epidemiologic surveillance of other reportable diseases, see primary 20280.

Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:

CY+1y 2y DE

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

SO nil DE

PIB	-00	Policy and procedures	- OPR	SO	5y	FR
			- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01	General				
	-02	AIDS registry case report files		SO	nil	DE
		SO = when the registry is cancelled				
	-03	AIDS statistical quarterly reports		SO	nil	FR

(Continued on next page)

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SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI = Freedom of Information/Privacy
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		<u>A</u>	<u>SA</u>	<u>FD</u>
22100	<u>EPIDEMIOLOGIC SURVEILLANCE OF SEXUALLY TRANSMITTED DISEASES</u> (Continued)			
	SO = when information is no longer required for reference purposes			
	FR = The government archives will fully retain AIDS statistical quarterly reports for their informational value. These records summarize the reporting and monitoring of the occurrences of AIDS in the province.			
-04	Gonorrhea surveillance forms	CY	nil	DE
-05	Chlamydia surveillance forms	CY	nil	DE
-20	STD/AIDS epidemiology research data	SO+1y	2y	DE
	SO = upon completion of the annual report			
-30	STD/AIDS annual report	CY+2y	5y	FR
	FR = The government archives will fully retain for the government archives one copy of each annual report from the director's office of STD/AIDS Control Services for its significant evidential and informational value in summarizing in a comprehensive manner all areas of the agency's work.			

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A SA FD

22300 PATIENT EXAMINATION AND TREATMENT

Records relating to the contact with, examination, diagnosis and treatment of patients with sexually transmitted diseases (STDs) and their contacts according to the *Health Act* (RSBC 1996, c. 179), the *Venereal Disease Act* (RSBC 1996, c. 475), and the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83). This includes records relating to patients of both the standing and outreach STD and ATEC (AIDS Testing, Evaluation and Counselling) clinics. Includes patient files, contact tracing and electronic database files.

For dispensing medications, see primary 20800 to 20900.

For general bacteriology laboratory test requisitions, see primary 21130.

For Human Immunodeficiency Virus (HIV) laboratory test requisitions, see primary 21190.

For serology (syphilis) laboratory test requisitions, see primary 21170.

For STD/AIDS treatment standards and guidelines, see primary 22800.

Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:

CY+1y 2y DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Contact tracing correspondence		CY	nil	DE
-03	Specialist referral correspondence		CY	nil	DE
-04	STD/ATEC clinic - daily lists		1m	nil	DE
-05	STD Control Information System (STDCIS) (electronic database)		SO	nil	DE

(Continued on next page)

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			<u>A</u>	<u>SA</u>	<u>FD</u>
22300	<u>PATIENT EXAMINATION AND TREATMENT</u> (Continued)				
	SO =	when database is superseded or obsolete and information has been migrated to a new format			
	NOTE:	For more information about the STD Control Information System, see the Information System Overview.			
	-06	STD Control Information System (STDCIS) - statistical reports	SO	nil	DE
	NOTE:	For more information about the STD Control Information System, see the Information System Overview.			
PIB	-20	HIV antibody test counselling visit case files (electronic database - STDCIS)	SO+1y	9y	DE
	SO =	when test results have been communicated to the patient and no further follow-up action is required			
	10y=	This retention period is based upon ministry practice to retain patient files for the ten-year period specified in the <i>Hospital Act Regulations</i> (B.C. Reg. 121/97, s.14) regarding the retention of patient records maintained by hospitals.			
	NOTE:	For more information on the STD Control Information System, see the Information System Overview.			
PIB	-30	Notifications of venereal infection (includes HLTH 208) (arrange alphabetically by patient name)	CY+1y	5y	DE

(Continued on next page)

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			<u>A</u>	<u>SA</u>	<u>FD</u>
22300	<u>PATIENT EXAMINATION AND TREATMENT</u> (Continued)				
PIB	-40	STD clinic patient files (electronic database - STDCIS)	SO+1y	9y	DE
	SO =	when patient ceases to attend treatment and no further follow-up action is required.			
	10y =	This retention period is based upon ministry practice to retain patient files for the ten-year period specified in the <i>Hospital Act Regulations</i> (B.C. Reg. 121/97, s.14) regarding the retention of patient records maintained by hospitals.			
	NOTE:	For more information on the STD Control Information System, see the Information System Overview.			
	DE =	HIV antibody test counselling visit case files, Notifications of venereal infection, and STD clinic patient files will be destroyed at the end of their semi-active retention period. The information they contain is highly personal and sensitive, and they contain little information beyond informing patients of their test results, and referring them to counselling and treatment services. The value of these records is not sufficient to justify the cost of selecting and preserving them, and of administering the privacy concerns surrounding their use.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
22500	<u>PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS - GENERAL</u>				
	Records relating to the development and functioning of public health programs designed to combat sexually transmitted diseases not shown elsewhere in this primary block. This includes both programs which are administered in whole or in part by the Division of STD/AIDS Control, as well as those which are provided by contracted agents or agencies. Includes statistics, reports, correspondence, and memoranda.				
	For the B.C. Native AIDS Awareness Program, see primary 22520.				
	For contract administration, see ARCS primary 1080.				
	For professional education and training programs, see primary 22550.				
	Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:		FY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Public health program development and analysis files (includes operating reports) (arrange alphabetically by program)		SO+1y	9y	SR
	SO = when analysis is complete				

(Continued on next page)

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A SA FD

22500 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS - GENERAL (Continued)

- 10y= This retention period ensures that records are maintained for evaluation of the development process, and for program consultation, analysis and review.
- SR = The government archives will selectively retain public health program development and analysis files for their evidential and informational value in documenting the development and functioning of public health programs to combat sexually transmitted diseases. In consultation with the staff of Communicable Disease Control Services, IDMB will select those program development and analysis files that document the most significant and precedent setting programs. At the time of transfer of these records to semi-active storage, the staff of Communicable Disease Control Services will box files for retention separately from other files.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
22520	<u>PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS</u> <u>- B.C. NATIVE AIDS AWARENESS PROGRAM</u>			
	Records relating to the provision of education and training workshops to aboriginal people and to health care workers providing services to aboriginal peoples about the prevention and control of sexually transmitted diseases and Human Immunodeficiency Virus (HIV)/Acquired Immune Deficiency Syndrome (AIDS). Includes correspondence, memoranda, course material, workshop plans and evaluations.			
	Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:	CY+1y	2y	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	5y	FR
	- OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
	- <u>non-OPR</u>			
-01	General			
-02	B.C. Native AIDS Awareness workshop plans	SO	NA	NA
	SO = when workshop evaluation is completed			
	NA = reclassify to 22520-03 when workshop is completed			
-03	B.C. Native AIDS Awareness workshop evaluations	FY+1y	5y	DE
-20	B.C. Native AIDS Awareness workshop materials (arrange by alphabetically by workshop title)	SO	2y	FR
	SO = when workshop curricula is revised			

(Continued on next page)

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PIB = Personal Information Bank	w = week m = month	FR = Full Retention
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A SA FD

22520 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS

- B.C. NATIVE AIDS AWARENESS PROGRAM

(Continued)

FR = The government archives will fully retain B.C. Native AIDS Awareness workshop materials for their evidential and informational value. These records document government educational programs for aboriginals and health care workers related to an issue of significant scientific and public importance.

-30	Teaching resources and reference files (arrange by alphabetically by subject)	SO	nil	DE
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SO = when information is no longer current

NOTE: Please notify the IDMB before disposing of any files which contain audio-visual aids, sound recordings, photographs, motion pictures, etc.

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A SA FD

22550 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS - EDUCATION AND TRAINING PROGRAMS

Records relating to the provision of education and training programs to health practitioners and the public on the prevention and control of sexually transmitted diseases and Acquired Immune Deficiency Syndrome (AIDS). This includes records relating to the provision of pre- and post-Human Immunodeficiency Virus (HIV) test counselling, the Professional Education Accessed Closer to Home (PEACH) program, and general STD awareness programs for schools, community agencies, corrections officials, public health nurses, etc. Includes course plans and evaluations, course material, correspondence and memoranda.

For the B.C. Native AIDS Awareness Program, see primary 22520.

Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:

CY+1y 2y DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE -</u>
-01	General				
-20	Public health program development and analysis files (includes operating reports) (arrange alphabetically by program)		SO+1y	9y	SR

SO = when analysis is complete

(Continued on next page)

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A SA FD

22550 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS - EDUCATION AND TRAINING PROGRAMS

10y= This retention period ensures that records are maintained for evaluation of the development process, and for program consultation, analysis and review.

SR = The government archives will selectively retain public health program development and analysis files for their evidential and informational value in documenting the development and functioning of public health programs to combat sexually transmitted diseases. In consultation with the staff of Communicable Disease Control Services, IDMB will select those program development and analysis files that document the most significant and precedent setting programs. At the time of transfer of these records to semi-active storage, the staff of Communicable Disease Control Services will box files for retention separately from other files.

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A SA FD

22550 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS
- EDUCATION AND TRAINING PROGRAMS

Records relating to the provision of education and training programs to health practitioners and the public on the prevention and control of sexually transmitted diseases and Acquired Immune Deficiency Syndrome (AIDS). This includes records relating to the provision of pre- and post-Human Immunodeficiency Virus (HIV) test counselling, the Professional Education Accessed Closer to Home (PEACH) program, and general STD awareness programs for schools, community agencies, corrections officials, public health nurses, etc. Includes course plans and evaluations, course material, correspondence and memoranda.

For the B.C. Native AIDS Awareness Program, see
primary 22520.

Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:

CY+1y 2y 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 - non-OPR
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SO	5y	FR
SO	nil	DE

- 01 General
- 02 Education and training needs assessments
- 03 Teaching resources
(includes reference material)

SO nil DE

SO = when information is no longer current

- 04 STD/AIDS education workshop participant lists
- 05 STD/AIDS education workshop plans
- 06 STD/AIDS education workshop evaluations

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
22550	<u>PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS</u> <u>- EDUCATION AND TRAINING PROGRAMS</u> (Continued)			

-20	STD/AIDS education workshop modules and course materials (arrange alphabetically by workshop title)	SO	2y	FR
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SO = when information is no longer current

FR = The government archives will fully retain
STD/AIDS education workshop modules and
course material for their evidential and
informational value. These records document
government educational programs for health
practitioners and the public related to an issue
of significant scientific and public importance.

NOTE: Please notify IDMB before disposing of any files which
contain audio-visual aids, sound recordings,
photographs, motion pictures, etc.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
22570	<u>PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS</u> <u>- OUTREACH PROGRAMS</u>				
	Records relating to the development and functioning of outreach programs to targeted persons or groups including street-involved clients and the gay community. Includes reports, statistics, correspondence and memoranda.				
	For examination and treatment of outreach clinic patients, see primary 22300.				
	Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:		CY+1y	2y	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR <u>non-OPR</u>	<u>SO</u> <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-20	Outreach program development and analysis files (includes operating reports) (arrange alphabetically by title of outreach program)		SO+1y	9y	FR
	SO = when analysis is complete				
	10y= This retention period ensures that records are maintained for evaluation of the development process, and for program evaluation, analysis and review.				

(Continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

22570 PUBLIC HEALTH PROGRAM DEVELOPMENT AND ANALYSIS OUTREACH PROGRAMS (Continued)

FR = The government archives will fully retain outreach program development and analysis files for their significant evidential and informational values. These records document outreach programs concerning issues of significant social and scientific importance.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
22700	<u>REFERENCE AND CONSULTATION ON SEXUALLY TRANSMITTED DISEASES</u>				
	Records relating to the provision of expert advice to health providers, other government staff and the public regarding the prevention, treatment and control of sexually transmitted diseases (STDs) and Acquired Immune Deficiency Syndrome (AIDS). This includes records relating to professional consultation, and the delivery of lectures and presentations. Includes correspondence, memoranda, statistics, reports, and reference material.				
	For ministry publications, see ARCS primary 312.				
	Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Public STD/AIDS information telephone services				
-03	Ministry of Education STD/AIDS curriculum development		SO	nil	DE
	SO = when curriculum is revised				
-04	STD/AIDS lecture notes and presentation materials		SO	nil	FR
	SO = when information is no longer current				
	NOTE: Please notify IDMB before disposing of any files which contain audio-visual aids, sound recordings, photographs, motion pictures, etc.				

(Continued on next page)

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A SA FD

22700 REFERENCE AND CONSULTATION ON SEXUALLY TRANSMITTED DISEASES (Continued)

FR = The government archives will fully retain
STD/AIDS lecture notes and presentation
materials for their evidential and informational
value. These records document government
provision of expert advice on an issue of
significant social and scientific concern.

-20	STD/AIDS subject reference files (includes literature and reference material) (arrange alphabetically by subject)	SO	nil	DE
-----	---	----	-----	----

SO = when no longer required for reference
purposes

NOTE: Codes may be used to identify subject files
as needed.

A = Active
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			<u>A</u>	<u>SA</u>	<u>FD</u>
22800	<u>CLINICAL RESEARCH AND INVESTIGATION</u>				
	Records relating to clinical research into sexually transmitted diseases (STDs) and Acquired Immune Deficiency Syndrome (AIDS), and the development of treatment strategies to prevent or control them according to the <i>Health Act</i> (RSBC 1996, c. 179). This includes records relating to the development of treatment guidelines for physicians, and the preparation of research articles and abstracts. Includes correspondence, memoranda, statistics, reports, reference material and manuscripts.				
	Unless otherwise specified below, the ministry OPR (Division of STD/AIDS Control) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Treatment standards and guidelines		SO	5y	FR
	SO = when new or revised standards are issued				
	FR = The government archives will fully retain STD/AIDS treatment standards and guidelines for their evidential and informational value. These records document government standards and guidelines for the treatment of diseases of significant social and scientific concern.				
-03	Provincial AIDS strategy		SO	5y	FR
	SO = when new or revised standards are issued				

(Continued on next page)

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A SA FD

22800 CLINICAL RESEARCH AND INVESTIGATION (Continued)

FR = The government archives will fully retain provincial AIDS strategy records for their evidential and informational value. These records document government standards and guidelines for the treatment of diseases of significant social and scientific concern.

-04 STD core program SO 5y FR

SO = when new or revised standards are issued

FR = The government archives will fully retain STD core program records for their evidential and informational value. These records document government standards and guidelines for the treatment of diseases of significant social and scientific concern.

-20 Clinical research project case files
(arrange alphabetically by project title) SO 5y SR

SO = when project is completed or abandoned and no further follow up action is required

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A SA FD

22800 CLINICAL RESEARCH AND INVESTIGATION (Continued)

SR = The government archives will selectively retain clinical research project case files for their evidential and information value. These records document STD/AIDS drug and treatment research conducted by the Communicable Disease Control Services (CDCC) staff. The government archives will retain one copy of the final research results, article or abstract from the office with the primary responsibility for conducting the research and writing the results. At the time of transfer of these files to semi-active storage, CDCC will box the final reports, articles or abstracts separately from the drafts and detailed research material.

-30	STD/AIDS reference materials (includes research articles, reports and abstracts collected from external sources) (arrange alphabetically by title)	SO	nil	DE
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SO = when information is no longer required for reference purposes

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A SA FD

SECTION 4

TUBERCULOSIS CONTROL SERVICES

PRIMARY NUMBERS

23000-23999

Section 4 covers records relating to the prevention and control of tuberculosis according to the *Health Act* (RSBC 1996, c. 179) and the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83). This includes records relating to: diagnosis and out-patient treatment of individuals with tuberculosis; contact tracing and screening of high-risk populations; participation in provincial and national registries for active cases; and consultation, reference and referral with other health practitioners concerning the treatment and control of tuberculosis.

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A SA FD

23000 - TUBERCULOSIS CONTROL SERVICES - 23999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

23000	TUBERCULOSIS CONTROL SERVICES - GENERAL
23200	EPIDEMIOLOGIC SURVEILLANCE OF TUBERCULOSIS
23400	EXAMINATION AND TREATMENT OF TUBERCULOSIS PATIENTS
23700	TUBERCULOSIS ISSUES, REPORTS AND STUDIES

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			<u>A</u>	<u>SA</u>	<u>FD</u>
23000	<u>TUBERCULOSIS CONTROL SERVICES - GENERAL</u>				
	Records not shown elsewhere in this primary block which relate generally to the treatment and control of tuberculosis according to the <i>Health Act</i> (RSBC 1996, c. 179) and the <i>Health Act Communicable Disease Regulations</i> (B.C. Reg. 4/83). Includes correspondence, reports and memoranda.				
	NOTE: Only records which cannot be classified in a more specific primary or secondary may be classified under this primary.				
	Unless otherwise specified below, the ministry OPR (Division of Tuberculosis Control) will retain these records for:				
			CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
4y =	This ensures the primary operational requirements of the creating agency are met.				
FR =	The government archives will fully retain all policy and procedure files created by offices having primary responsibility for policy and procedure development and approval for their evidential value. Draft and duplicate materials which hold no evidential value may be purged and discarded.				

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			<u>A</u>	<u>SA</u>	<u>FD</u>
23200	<u>EPIDEMIOLOGIC SURVEILLANCE OF TUBERCULOSIS</u>				
	Records relating to the maintenance of and/or participation in provincial and national registries for the review and analysis of active cases of tuberculosis, including suspect cases and cases on prophylaxis, according to the <i>Health Act</i> (RSBC 1996, c. 179) and the <i>Health Act Communicable Disease Regulations</i> (B.C. Reg. 4/83). Includes national registry notification forms and patient follow-up reports, and registry database files.				
	For statistical reports, see primary 23700.				
	Unless otherwise specified below, the ministry OPR (Registry, Division of Tuberculosis Control) will retain these records for:				
			CY+1y	3y	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	5y	FR
		- OPR	<u>SO</u>	<u>nil</u>	<u>DE</u>
		- <u>non-OPR</u>			
PIB	-01	General			
	-02	Statistics Canada tuberculosis notification forms (8-2300-86.1)			
PIB	-03	Statistics Canada tuberculosis follow-up forms (8-2300-66.3)			
	-04	Statistics Canada yearly reports	CY+2y	7y	DE
	10y=	This ensures records are retained for analysis and review.			
PIB	-05	Tuberculosis registry database (electronic database)	SO	nil	DE

(Continued on next page)

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A SA FD

23200 EPIDEMIOLOGIC SURVEILLANCE OF TUBERCULOSIS

(Continued)

SO = when database is superseded or obsolete and
information has been migrated to a new format

NOTE: For more information on the registry database
and the Tuberculosis Clinic System, see the
Information System Overview.

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A SA FD

23400 EXAMINATION AND TREATMENT OF TUBERCULOSIS
PATIENTS

Records relating to the examination for, diagnosis and treatment of individuals with tuberculosis according to the *Health Act* (RSBC 1996, c. 179) and the *Health Act Communicable Disease Regulations* (B.C. Reg. 4/83). This includes patients of standing and travelling clinics in British Columbia and the Yukon Territory, as well as patients of the aboriginal program provided in cooperation with Health Canada. Includes screening program patient files, clinic patient files, x-rays and database patient files.

For dispensing of medications, see primary 20800 to 20900.
For mycobacteriology laboratory requisitions, see primary 21140.

For tuberculosis patients treated through Community Health Programs administered in local health units, see *Community Health Programs ORCS*.

Unless otherwise specified below, the ministry OPR (Division of Tuberculosis Control) will retain these records for:

CY+1y 2y 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 - non-OPR
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SO	5y	FR
SO	nil	DE

-01 General

-02 Admission work cards

PIB	-03	Tuberculosis Clinic System patient database (electronic database)
-----	-----	--

SO nil DE

SO = when database is superseded or obsolete and information has been migrated to a new format

(Continued on next page)

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A SA FD

23400 EXAMINATION AND TREATMENT OF TUBERCULOSIS PATIENTS (Continued)

NOTE: For more information on the Tuberculosis Clinic System, see the Information System Overview.

PIB	-20	Tuberculosis clinic patient files (paper files) (arrange numerically by patient number)	SO+1y	9y	FR
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SO = when patient ceases to attend treatment and no further follow up action is required

10y = This retention period is based upon ministry practice to retain patient files for the ten-year period specified in the *Hospital Act Regulations* (B.C. Reg. 121/97, s.14) regarding the retention of patient records maintained by hospitals.

FR = The government archives will fully retain tuberculosis clinic patient files for their significant evidential and informational value. These records represent a complete run of tuberculosis patient files from 1938, and are a uniquely valuable source for research into tuberculosis.

NOTE: The Tuberculosis Control Division will store tuberculosis clinic patient files under RCS ongoing accession number 91-0597.

NOTE: Tuberculosis patient x-rays should be filed under 23400-60.

(Continued on next page)

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				A	SA	FD
23400	<u>EXAMINATION AND TREATMENT OF TUBERCULOSIS PATIENTS</u> (Continued)					
PIB	-30	<p>Tuberculosis screening program client files - adults - positive and negative results - OPR - <u>non-OPR</u></p> <p>(includes HLTH 939) (arrange alphabetically by client name, then chronologically by year)</p> <p>SO = when test results have been communicated to the client and/or treatment has been completed and no further follow-up action is required</p> <p>10y = This retention period is based upon ministry practice to retain patient files for the ten-year period specified in the <i>Hospital Act Regulations</i> (B.C. Reg. 121/97, s.14) regarding the retention of patient records maintained by hospitals.</p>		SO+1y <u>SO+1y</u>	9y <u>nil</u>	DE <u>DE</u>
PIB	-40	<p>Tuberculosis screening program client files - minors - negative results - OPR - <u>non-OPR</u></p> <p>(includes HLTH 939) (arrange alphabetically by client name, then chronologically by year)</p> <p>SO = when test results are communicated to client</p> <p>10y = This retention period is based upon ministry practice to retain patient files for the ten-year period specified in the <i>Hospital Act Regulations</i> (B.C. Reg. 121/97, s.14) regarding the retention of patient records maintained by hospitals.</p>		SO+1y <u>SO+1y</u>	9y <u>nil</u>	DE <u>DE</u>

(Continued on next page)

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			<u>A</u>	<u>SA</u>	<u>FD</u>
23400	<u>EXAMINATION AND TREATMENT OF TUBERCULOSIS PATIENTS</u> (Continued)				
PIB	-50	Tuberculosis screening program client files - minors - positive results (includes HLTH 939) (arrange alphabetically by client name, then chronologically by year)	- OPR - <u>non-OPR</u>	SO+1y 25y <u>SO+1y</u> <u>nil</u>	DE <u>DE</u>
		SO = when test results have been communicated to the client, and/or when treatment has been completed and no further follow-up action is required			
		26y = This will ensure that records are retained until the expiration of the right of minors, upon reaching the age of majority, to initiate a legal action specified under the <i>Limitation Act</i> (RSBC 1996, c. 266). The additional year is allowed for serving the notice to all parties.			
PIB	-60	Tuberculosis x-rays (arrange numerically by patient number)		SO+1y 9y	DE
		SO = when patient ceases to attend treatment and no further follow-up action is required			
		10y = This retention period is based upon ministry practice to retain patient files for the ten-year period specified in the <i>Hospital Act Regulations</i> (B.C. Reg. 121/97, s.14) regarding the retention of patient records maintained by hospitals.			
		DE = Although the x-rays were created in conjunction with the patient files scheduled for retention by IDMB (23400-20), they are not considered to have residual research value, and may be destroyed without compromising the medical record.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
23700	<u>TUBERCULOSIS ISSUES, STUDIES AND REPORTS</u>				
	Records relating to the provision of technical and policy advice to health units, health professionals, government staff and the general public concerning generally the treatment and control of tuberculosis according to the <i>Health Act</i> (RSBC 1996, c. 179). This does not include consultation about specific patients. Includes statistics, reports, reference material, related correspondence and memoranda.				
	For committees and task forces, see ARCS primaries 200 to 206. For consultation concerning specific patients, see primary 23400. For training courses, see ARCS primaries 1730 to 1740. For workload statistics and activity reports, see ARCS primaries 440 to 448.				
	Unless otherwise specified below, the ministry OPR (Division of Tuberculosis Control) will retain these records for:		CY+1y	2y	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	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Tuberculosis issue files (includes reference material, reports, related correspondence and memoranda) (arrange alphabetically by subject)		SO	nil	DE
	SO = when the information is no longer required for reference purposes				

(Continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
23700	<u>TUBERCULOSIS ISSUES, STUDIES AND REPORTS</u> (Continued)			
-30	Tuberculosis research projects (includes correspondence, memoranda, reference material, rough notes, and draft manuscripts) (arrange alphabetically by subject)	SO+1y	5y	SR
	SO = when project final report is completed or project abandoned			
	SR = The government archives will selectively retain tuberculosis research project files for their evidential and informational value. These records document research into a significant public health issue. In consultation with the staff of the Division of Tuberculosis, the government archives will select those research project files that document the most significant and precedent setting projects. At the time of transfer of these records to semi-active storage the staff of the Division of Tuberculosis Control will box the files for retention separately from other files and will indicate on the box list which boxes are for retention and which are for destruction.			
-40	Tuberculosis studies and reports	SO+1y	5y	FR
	SO = when study or report is completed or abandoned			
	FR = The government archives will fully retain one copy of each final study or report, including the Statistical Epidemiological Report, for its significant informational value. These records document research into a significant public health issue.			

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

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW AND INFORMATION SYSTEM OVERVIEW FOR AN APPLICATION

ARS	ADVERSE REACTION SYSTEM
BPMS	BIOLOGICAL PRODUCTS MANAGEMENT SYSTEM
CDSS	COMMUNICABLE DISEASE SURVEILLANCE SYSTEM
CDSS/EPID	EPIDEMIOLOGY SECTION
CDSS/FIELD	FIELD SECTION
ISS	INFLUENZA SURVEILLANCE SYSTEM
	LABORATORY SYSTEM
	PHARMACY SYSTEM
STDCIS	STD CONTROL INFORMATION SYSTEM
TBCS	TUBERCULOSIS CLINIC SYSTEM

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION, OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Communicable Disease Epidemiology Services

SYSTEM TITLE:

Adverse Reaction System (ARS)

APPLICATION TITLE:

Adverse Reaction System (ARS)

PURPOSE:

To assist Communicable Disease Epidemiology Services staff in the surveillance of adverse reactions to immunizing agents.

INFORMATION CONTENT:

The ARS includes demographic information of individuals suffering adverse reactions to immunizing agents, and case information such as the immunizing agent and the nature of the adverse event, which are reported to the B.C. Centre for Disease Control from provincial health units and departments.

RETENTION AND DISPOSITION SUMMARY:

The ARS database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmers' guide and users' guides) are retained until the database is superseded or obsolete, and then destroyed.

Data from the ARS is retained on the hard drive of the host computer, with monthly back-ups stored on tape off-site.

For Transitory Electronic Data Processing (EDP) Records, see schedule number 102902.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs are classified in *Communicable Disease Control Services ORCS* section 1, primary 20420:

20420-02 Immunization - Adverse Reactions to Immunizing Agents - Adverse Reaction Surveillance Reports

These reports (HLTH 2319) are sent in from the health units and health departments. They contain case demographic information, and the nature of the adverse event. The form is not a transitory input document; a photocopy is sent to the Laboratory Centre for Disease Control in Ottawa, while the original is kept on file to address follow-up.

PROCESSES

When an adverse reaction to an immunizing agent occurs, the pertinent information is collected by the health unit or health department and is transmitted to the Communicable Disease Epidemiology Services of the B.C. Centre for Disease Control. Adverse reaction information is also maintained in the health units on form HLTH 182, the Child Health Record. The data is entered into the adverse reaction surveillance system and is used to produce regular and ad hoc reports and statistics on the nature and occurrence of adverse reactions for analysis and review.

OUTPUTS

Outputs are classified in *Communicable Disease Control Services ORCS*, section 1, primary 20420:

20420-05 Immunization - Adverse Reactions to Immunizing Agents - ARS
Statistical Reports - Annual

SOFTWARE ENVIRONMENT:

The ARS was designed using Nantucket's CLIPPER.

HARDWARE ENVIRONMENT:

The ARS runs on a NEC Power Mate 466 es computer located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

The ARS was implemented on 1992 January 1.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

USER CONTACTS:

Dr. Alison Bell, Director, Communicable Disease Epidemiology Services, 660-6061.

SYSTEM CONTACTS:

Lee Syrja, Computer Coordinator, Communicable Disease Epidemiology Services, 660-6064.

DOCUMENTATION/MANUALS CROSS-REFERENCES:

Adverse Reaction System, B.C. Centre for Disease Control, Users' Guide, [no date];
Communicable Disease Surveillance System, B.C. Centre of Disease Control Programmers' Guide, [no date].

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 1, primary 20420:

20420-03 Immunization - Adverse Reactions to Immunizing Agents - Adverse Reaction System (ARS)

CLASSIFICATION SYSTEM CROSS REFERENCES (OTHER RELATED RECORDS):

Communicable Disease Control Services ORCS, section 1, primary 20420.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION OR OFFICE:

Community Health, B.C. Centre for Disease Control, Communicable Disease Epidemiology Services

SYSTEM TITLE:

Biological Products Management System (BPMS)

APPLICATION TITLE:

Biological Products Management System (BPMS)

PURPOSE:

To track the ordering and inventory of biological products purchased by Communicable Disease Epidemiology Services and distributed to provincial health units and departments, hospitals, schools, correctional institutions and other authorized client agencies.

INFORMATION CONTENT:

The BPMS includes information regarding the ordering, invoicing, distribution coordination, and inventory of biological products procured by Communicable Disease Epidemiology Services.

Information is also recorded regarding vaccines discarded due to breakage, expiration and contamination, as are queries from the field regarding vaccine stability and potential vaccine spoilage.

RETENTION AND DISPOSITION SUMMARY:

The BPMS database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmers' guide and users' guides) are retained until the database is superseded or obsolete, and then destroyed.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

Data from the BPMS is retained on the hard drive of the host computer, with regular back-ups stored on diskette.

For Transitory Electronic Data Processing Records, see schedule number 102902.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of data from paper requisitions submitted by health units and departments, hospitals, schools, correctional institutions, and other client agencies, including requisitions for biological products (HLTH 67), hepatitis B vaccine (HLTH 68), and emergency biological products (HLTH 2315). These forms are classified in *Communicable Disease Control Services ORCS*, section 3, primary 20630.

Inputs also consist of orders for biological products relayed via telephone to Communicable Disease Epidemiology Services by the client agencies outlined above.

PROCESSES

An order for biological products, submitted either by requisition or telephone, is entered into the BPMS along with a corresponding order number and date. This order is then sent via facsimile to a contracted warehouse distributor who obtains the requested biological products from its supplier, issues an invoice to Communicable Disease Epidemiology Services, delivers the orders to the appropriate client agency, and sends Communicable Disease Epidemiology Services a delivery confirmation slip. Delivery confirmation slips are matched to outstanding orders and invoices, and this information is entered into the BPMS. The system also monitors the direct invoicing of clients ordering travel vaccines.

The BPMS tracks warehouse stock availability and allows for the printing of distributor inventory reports. Order information contained in the system, including credits for biological product damage and replacement, is used for reconciliation against warehouse supply.

OUTPUTS

Outputs consist of client invoice logs. These logs document outstanding invoices for those clients charged directly for travel vaccines.

Distributor inventory reports are generated on an ad hoc basis. They provide information regarding warehouse stock availability and signal the need to replenish warehouse supplies.

Both these outputs are classified in Section 1 of the Communicable Disease Control Services ORCS:

20630-03 Biological Products - Procurement and Distribution
 - Biological Products Distribution

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

SOFTWARE ENVIRONMENT:

The BPMS was designed using Platinum Information System.

HARDWARE ENVIRONMENT:

The BPMS runs on a NEC Power Mate 466 es. computer located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

BPMS implementation date and milestones are unknown.

USER CONTACTS:

Willie Wong, Biologicals Clerk, Communicable Disease Epidemiology Services, 660-2550.

SYSTEM CONTACTS:

Lee Syrja, Computer Coordinator, Communicable Disease Epidemiology Services, 660-6064.

DOCUMENTATION/MANUALS CROSS-REFERENCES:

Platinum Information System Users' Manual, [no date].

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 1, primary 20630:

20630-04	Biological Products - Procurement and Distribution - Biological Products Management System (BPMS)
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CLASSIFICATION SYSTEM CROSS REFERENCES (OTHER RELATED RECORDS):

Communicable Disease Control Services ORCS, section 1, primary 20630: Biological Products – Procurement and Distribution

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Communicable Disease Epidemiology Services

SYSTEM TITLE:

Communicable Disease Surveillance System (CDSS)

APPLICATION TITLE:

Communicable Disease Surveillance System (CDSS)

PURPOSE:

To automate the reporting of communicable diseases by provincial health units and departments for surveillance, analysis and review.

INFORMATION CONTENT:

The CDSS has two separate systems. The CDSS Field Section, is installed on computers in the health units and departments, and the CDSS Epidemiology Section, is installed on a computer at the B.C. Centre for Disease Control in Vancouver.

1. CDSS - Field Section - The purpose of the CDSS Field Section is to assist health unit staff with disease surveillance and the reporting of communicable diseases according to the *Health Act* (RSBC 1996, c. 179), and the *Health Act Communicable Disease Regulations* (B.C. Reg. 4/83) .
2. CDSS - Epidemiology Section - The purpose of the CDSS Epidemiology Section is to assist Communicable Disease Epidemiology staff in reporting communicable diseases to the Laboratory Centre for Disease Control in Ottawa and to act as surveillance for potential outbreak situations.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW FOR AN APPLICATION

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Communicable Disease Epidemiology Services

SYSTEM TITLE:

Communicable Disease Surveillance System (CDSS)

APPLICATION TITLE:

Communicable Disease Surveillance System (CDSS) Epidemiology Section

PURPOSE:

To assist Communicable Disease Epidemiology Services staff in the reporting of communicable diseases to the Laboratory Centre for Disease Control in Ottawa and in the surveillance of communicable diseases in the province for potential outbreak situations.

INFORMATION CONTENT:

The CDSS Epidemiology Section includes demographic information of individuals suffering from communicable diseases, some laboratory reports, and epidemiological information reported from provincial health units and departments.

RETENTION AND DISPOSITION SUMMARY:

The CDSS Epidemiology Section database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmers' guide and users' guides) are retained until the database is superseded or obsolete, and then destroyed.

Data from the CDSS Epidemiology Section is retained on the hard drive of the host computer, with monthly back-ups stored on tape off-site.

For Transitory Electronic Data Processing (EDP) Records, see schedule number 102902.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of communicable disease case data transmitted electronically every week by each health unit and health department to Communicable Disease Epidemiology Services. The records contain case demographic information, some laboratory reports and treatment outcome information.

PROCESSES

Information collected by the health units and health departments is imported into a central database and is used to produce regular and ad hoc reports and statistics on the occurrence of communicable disease outbreaks for analysis and review.

OUTPUTS

Outputs are classified in section 1 of the *Communicable Disease Control Services ORCS*:

20280-05	Disease Control - Surveillance - CDSS Statistical Reports - Weekly
20280-06	Disease Control - Surveillance - CDSS Statistical Reports - Monthly

SOFTWARE ENVIRONMENT:

The CDSS Epidemiology Section was designed using Nantucket's CLIPPER.

HARDWARE ENVIRONMENT:

The CDSS Epidemiology Section runs on a NEC Power Mate 466 es PC located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

The CDSS Epidemiology Section was implemented in October, 1991.

USER CONTACTS:

Dr. Alison Bell, Director, Communicable Disease Epidemiology Services, 660-6061.

SYSTEM CONTACTS:

Lee Syrja, Computer Coordinator, Communicable Disease Epidemiology, 660-6064.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

DOCUMENTATION/MANUALS CROSS-REFERENCES:

Communicable Disease Surveillance System B.C. Centre for Disease Control version 2.0 Users' Guide, February 1991; Communicable Disease Surveillance System B.C. Centre of Disease Control version 2.0 Programmers' Reference, 1991.

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 1, primary 20280:

20280-03 Disease Control - Surveillance - Communicable Disease
 Surveillance System (CDSS) Epidemiology Section

CLASSIFICATION SYSTEM CROSS REFERENCES (OTHER RELATED RECORDS):

Communicable Disease Control Services ORCS, section 1, primary 20280.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW FOR AN APPLICATION

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Communicable Disease Epidemiology Services

SYSTEM TITLE:

Communicable Disease Surveillance System (CDSS)

APPLICATION TITLE:

Communicable Disease Surveillance System (CDSS) Field Section

PURPOSE:

To assist health unit staff in the reporting of communicable diseases specified by the *Health Act Communicable Disease Regulations* (B.C. Reg. 4/83) to the B.C. Centre for Disease Control.

INFORMATION CONTENT:

The CDSS Field Section includes demographic information of individuals suffering from communicable diseases, some laboratory reports, and epidemiological information.

RETENTION AND DISPOSITION SUMMARY:

The CDSS Field Section database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmers' guide and users' guides) are retained until the database is superseded or obsolete, and then destroyed.

For transitory electronic data processing (EDP) records, see schedule number 102902.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of case data gathered by the health units and departments.

PROCESSES

The system allows one to enter case data, update data, and to transmit data to the CDSS system in Vancouver.

OUTPUTS

The record of communicable disease is sent electronically to the Communicable Disease Epidemiology Services of the B.C. Centre for Disease Control in Vancouver. Edit logs showing entries, revisions and deletions, are printed weekly and sent to Communicable Disease Epidemiology Services in Vancouver. Edit logs are classified in section 1 of the *Communicable Disease Control Services ORCS*, primary 20280:

20280-04 Disease Control - Surveillance - CDSS Edit Logs

SOFTWARE ENVIRONMENT:

The CDSS Field Section was designed using Nantucket's CLIPPER.

HARDWARE ENVIRONMENT:

The CDSS Field Section is operated from local DOS PCs.

SYSTEM MILESTONES:

The CDSS Field Section was implemented province-wide on 1991 October 1.

USER CONTACTS:

Individual health unit and health department offices.

SYSTEM CONTACTS:

Lee Syrja, Computer Coordinator, Communicable Disease Epidemiology Services,
660-6064.

DOCUMENTATION/MANUALS CROSS-REFERENCES:

Communicable Disease Surveillance System Health Unit Version 2.0 Users' Guide, July 1991;
Communicable Disease Surveillance System Health Unit version 2.0 Programmers' Reference,
March 1991.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 1, primary 20280:

20280-04	Disease Control - Surveillance - Communicable Disease Surveillance System (CDSS) Field Section
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CLASSIFICATION SYSTEM CROSS REFERENCES (OTHER RELATED RECORDS):

Communicable Disease Control Services ORCS, section 1, primary 20280.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Communicable Disease Epidemiology Services

SYSTEM TITLE:

Influenza Surveillance System (ISS)

APPLICATION TITLE:

Influenza Surveillance System (ISS)

PURPOSE:

To track rates of influenza infection throughout the province using a group of sentinel physicians during the influenza season (September - April).

INFORMATION CONTENT:

The ISS includes demographic information for the group of sentinel physicians in the province, and case information about influenza-like illnesses reported to the B.C. Centre for Disease Control.

RETENTION AND DISPOSITION SUMMARY:

The ISS database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmers' guide and users' guides) are retained until the database is superseded or obsolete, and then destroyed.

Data from the ISS is retained on the hard drive of the host computer, with regular back-ups stored on diskette.

For Transitory Electronic Data Processing (EDP) Records, see records retention and disposal authority 102902.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of case information of influenza-like illnesses reported via telephone to the Communicable Disease Epidemiology Services by a group of sentinel physicians.

PROCESSES

Information collected by the sentinel physicians is entered into the surveillance system and is compiled into reports for analysis and review.

OUTPUTS

Outputs consist of postings to a ministry electronic bulletin board and irregular update reports sent to the sentinel physicians.

SOFTWARE ENVIRONMENT:

The ISS was designed using DBase III+.

HARDWARE ENVIRONMENT:

The ISS runs on a NEC Power Mate 466 es PC located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

The system was implemented in 1988-89.

USER CONTACTS:

Dr. Alison Bell, Director, Communicable Disease Epidemiology Services, 660-6061.

SYSTEM CONTACTS:

Lee Syrja, Computer Coordinator, Communicable Disease Epidemiology Services, 660-6064.

DOCUMENTATION/MANUALS CROSS-REFERENCES:

Viral Influenza, Chicken Pox, Genital Warts, Herpes Surveillance Programmers' Manual, December, 1994.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 1, primary 20280:

20280-08	Disease Control - Surveillance - Influenza Surveillance System (ISS)
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CLASSIFICATION SYSTEM CROSS REFERENCES (OTHER RELATED RECORDS):

Communicable Disease Control Services ORCS, section 1, primary 20280.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Provincial Laboratory Division

SYSTEM TITLE:

Laboratory System

APPLICATION TITLE:

Laboratory System

PURPOSE:

To assist Provincial Laboratory staff in tracking specimens from their receipt through testing, and to generate results reports to Laboratory clients.

INFORMATION CONTENT:

The Laboratory System consists of a number of related databases containing information necessary to test submitted specimens for etiological agents and report the test results. This includes a registry of submitting physicians, including names, addresses, telephone numbers and MSP billing numbers; a registry of other submitting clients including hospitals, other laboratories, and clinics; and a patient registry which includes demographic information about patients who have had specimens submitted to the lab for testing. The patient, physician and client registries are shared amongst all sections, and in addition, each laboratory section has its own tracking module. The specimen databases for each section include information about each specimen received, the tests performed on the specimen, and the results. There is also a database on sensitivity testing for drug resistant specimens, and an audit system for verification of test results and verification of data entry.

RETENTION AND DISPOSITION SUMMARY:

The Laboratory System database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

Manuals (programmers' guide and users' guide) are retained until the database is superseded or obsolete, and then destroyed.

Data from the Laboratory System is retained on-line for a period of 30 months and is then purged to off-line storage. Back-ups are performed nightly, and weekly back-up tapes are stored off-site.

For Transitory Electronic Data Processing (EDP) Records, see special schedule 102902.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of patient, submitter and specimen information recorded on test requisition forms from each laboratory section (except Food-borne Diseases Section) and the test results. These are classified in section 2 of the *Communicable Disease Control ORCS* as follows:

21110-02	Laboratory Services - Enteric Bacteriology - Enteric Bacteriology Test Requisitions
21130-02	Laboratory Services - General Bacteriology - General Bacteriology Test Requisitions
21140-02	Laboratory Services - Mycobacteriology - Mycobacteriology Test Requisitions
21150-02	Laboratory Services - Mycology - Mycology Test Requisitions
21160-02	Laboratory Services - Parasitology - Parasitology Examinations
21170-02	Laboratory Services - Serology - Serology Test Requisitions
21190-02	Laboratory Services - Virology - Virology Test Requisitions
21195-02	Laboratory Services - Water Bacteriology - Water Bacteriology Test Requisitions

PROCESSES

Specimens are received at the Provincial Laboratory and are delivered to the appropriate section for testing. Requisition information, including patient name and submitting agent or agency as well as the test required, is entered onto the database. In some instances, worksheets are generated for use in the labs to document what test(s) were performed, by whom and with what results. Results are entered and verified on the computer and are then either printed and mailed to the submitter, or they are encrypted and downloaded nightly to a private company (MEDINET), which reports results electronically to its client agencies. Results summaries are maintained on microfilm at the Provincial Laboratory.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

OUTPUTS

Outputs consist of test result reports, statistical summary reports, and internal worksheets classified in section 2 of the *Communicable Disease Control ORCS* as follows:

21100-03	Laboratory Services - General - Laboratory System Statistical Reports
21100-04	Laboratory Services - General - Laboratory Specimen Testing Results
21100-05	Laboratory Services - General - Undeliverable Laboratory Specimen Testing Results
21110-04	Laboratory Services - Enteric Bacteriology - Enteric Bacteriology Worksheets
21130-04	Laboratory Services - General Bacteriology - General Bacteriology Worksheets
21140-03	Laboratory Services - Mycobacteriology - Mycobacteriology Worksheets
21150-03	Laboratory Services - Mycology - Mycology Worksheets
21160-04	Laboratory Services - Parasitology - Parasitology Worksheets
21170-04	Laboratory Services - Serology - Serology Worksheets
21190-03	Laboratory Services - Virology - Virology Worksheets

SOFTWARE ENVIRONMENT:

The Laboratory System runs in a UNIX environment and was programmed using "M" (also known as Massachusetts University Multi-Programming System, or MUMPS).

HARDWARE ENVIRONMENT:

The Laboratory System runs on a Data General AViiON mainframe computer located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

The system was first developed in 1988. In 1993, it was converted from MIIS to MUMPS.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

USER CONTACT:

Individual laboratory section heads.

TECHNICAL CONTACT:

Kevin Belobaba, Data Administrator, Public Health Systems, 660-6561.

DOCUMENTATION/MANUALS:

Provincial Laboratory Computer System Manual [DRAFT]
Programmers' reference consists of MUMPS programming language documentation.

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control ORCS, section 2, primary 21100:

21100-02 Laboratory Services - General - Laboratory System

OTHER RELATED RECORDS:

Communicable Disease Control ORCS, section 2, primaries 21100 to 21195.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, BC Centre for Disease Control, Planning and Development, Pharmacy Services

SYSTEM TITLE:

Pharmacy System

APPLICATION TITLE:

Pharmacy System

PURPOSE:

To assist Pharmacy Services staff in the dispensing of pharmaceutical products in support of disease control programs of the B.C. Centre for Disease Control and Kidney Dialysis Services.

INFORMATION CONTENT:

The Pharmacy System contains information needed to identify clients and their prescription history to ensure the safe distribution of pharmaceuticals for authorized clients. This includes: patient name, date of birth, sex, address, allergies, diagnosis, physician/health facility and address, prescription, medication information, lot number and expiry date, dates filled, quantities, dosage directions/changes in directions, prescribing doctor, distribution information (where, when and how sent), and manifest numbers.

RETENTION AND DISPOSITION SUMMARY:

The Pharmacy System database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmer's guide and user's guide) are retained until the database is superseded or obsolete, and then destroyed.

Back-ups are performed twice daily, and weekly back-up tapes are stored off-site. Patients no longer receiving treatment are removed from the active patient files.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

For Transitory Electronic Data Processing (EDP) Records, see schedule number 102902.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Pharmacy System inputs consist of prescriptions and drug requisition forms, including Tuberculosis Medication Order Forms (HLTH 808); Tuberculosis Medication Reorder Forms (HLTH 850), Sexually Transmitted Diseases drug order request forms (HLTH 252), requisitions from nephrologists, and other prescriptions from physicians. These forms are then placed on the appropriate prescription file classified in section 1 of the *Communicable Disease Control Services ORCS*, primary 20900 - Pharmacy Services.

PROCESSES

Prescription and client data is entered onto the system and used to update patient and prescription information, the system assigns a unique manifest number to each prescription order which is required to be sent. The manifest form is used to ship the medications and to assist in auditing the system.

OUTPUTS

Outputs consist of shipping manifests; one copy is given to the patient, while the other is maintained on the appropriate prescription file classified in section 1 of the *Communicable Disease Control Services ORCS*, primary 20900 - Pharmacy Services.

SOFTWARE ENVIRONMENT:

The Pharmacy System was written using Business BASIC.

HARDWARE ENVIRONMENT:

The system runs on a Data General AViiON mainframe computer located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

The Pharmacy System was implemented in 1989.

USER CONTACT:

Joyce Seto, Pharmacist, Pharmacy Services, 660-6000

TECHNICAL CONTACT:

Craig Ashton, Application Programming, Public Health Systems, 660-6748

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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DOCUMENTATION/MANUALS:

Pharmacy System Programmers' Guide, October, 1989
Pharmacy System Users' Guide, [no date]

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 1, primary 20900:

20900-09 Pharmacy Services - Patient Medication - Pharmacy System

OTHER RELATED RECORDS:

Communicable Disease Control Services ORCS, section 1, primary 20900.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, B.C. Centre for Disease Control, Division of Sexually Transmitted Disease (STD/AIDS) Control

SYSTEM TITLE:

STD Control Information System (STDCIS)

APPLICATION TITLE:

STD Control Information System (STDCIS)

PURPOSE:

The automation of patient information to assist clinical staff in the diagnosis and treatment of sexually transmitted diseases, to assist staff in contact tracing, and to maintain statistical information to assist in the reporting of communicable diseases according to the *Health Act Communicable Disease Regulation* (B.C. Reg. 4/83).

INFORMATION CONTENT:

The STDCIS contains information necessary to diagnose and treat clinic patients. This includes: patient name, sex, date of birth, address, phone number, marital status, physical characteristics, date of visit, previous encounters, encounter type, diagnosis, clinical notes, symptoms, treatment, prescription information, physician name, laboratory results and contact information for STD Clinic patients. The AIDS Testing, Evaluation and Counselling (ATEC) Clinic is a non-nominal system. Patients are not required to give their names but are identified by their initials or other identifier.

RETENTION AND DISPOSITION SUMMARY:

The STDCIS database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmers' reference and users' guide) are retained until the database is superseded or obsolete, and then destroyed.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

Data from the STDCIS is backed-up daily, and weekly back-up tapes are stored off-site. Patients whose charts are closed are removed from active status, but data is retained for statistical purposes or in case of re-infection.

For Transitory Electronic Data Processing (EDP) Records, see schedule number 102902.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of client demographic, diagnosis and treatment information which is collected from the client when he or she attends the clinic or when contact is made during an outreach visit or street encounter. STD patient information is also collected by physicians and public health nurses in health unit offices and is either recorded on the Notification of Venereal Infection form (HLTH 208) and entered onto the system by Vancouver clinic staff, or it is entered directly by those health units which have on-line access to the STD Control Information System. These forms are classified in Section 3 of the *Communicable Disease Control Services ORCS*, primary 22300:

22300-30 Patient Examination and Treatment - Notifications of Venereal Infection

Laboratory test results are also entered onto the patient's chart. These are classified in Section 2 of the *Communicable Disease Control Services ORCS*, primary 21100:

21100-04 Laboratory Services - General - Laboratory Test Result Reports

PROCESSES

The system allows clinic staff to book appointments for those clients who do not simply drop-in. When the client checks in to the clinic or is encountered in a street visit or outreach visit, the system allows staff to create an encounter record which records certain demographic information and assigns a unique number to that client. Client chart information, such as clinical notes, diagnoses, treatments, laboratory results, informant and contact information is entered by the attending physician or nurse for each visit. The system also allows clinic staff to give test results to clients, to search the system on a number of data elements (such as physical characteristics, physician information, pharmacy drug numbers, etc.), and to generate a variety of statistical reports.

OUTPUTS

Outputs consist of statistical reports which are generated daily, monthly, quarterly and ad hoc. EPID reports, which list clinic client visits, are generated daily. Other reports include: encounter summaries, diagnosis summaries, reportable diseases, clinic visits, vital statistics summaries, syphilis report, diagnosis by age/sex, missing lab results, open charts, referred epid encounters, contact summaries, chart audit reports, single encounter reports and multiple encounter reports. These are classified in Section 3 of the *Communicable Disease Control Services ORCS*:

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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22300-04	Patient Examination and Treatment - STD/ATEC Clinic - Daily Lists
22300-06	Patient Examination and Treatment - STD Control Information System (STDCIS) - Statistical Reports

SOFTWARE ENVIRONMENT:

The STDCIS was written in MSM [Micronetics Standard MUMPS (Massachusetts University Multi-Programming System)].

HARDWARE ENVIRONMENT:

The STDCIS runs in a UNIX environment on a Data General AViiON mainframe computer located at the B.C. Centre for Disease Control in Vancouver.

SYSTEM MILESTONES:

The STDCIS was established in 1988. A major re-write was performed in 1990 and the ATEC component was added in 1994.

USER CONTACTS:

Linda Knowles, Clinic Operations, Division of STD/AIDS Control, 660-6743.

SYSTEM CONTACTS:

Rob MacDougall, Research Officer, Division of STD/AIDS Control, 660-6168.

DOCUMENTATION/MANUALS CROSS-REFERENCES:

STD Control Information System User Guide, [DRAFT]

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 3, primary 22300:

22300-05	Patient Examination and Treatment - STD Control Information System (STDCIS)
22300-20	Patient Examination and Treatment - HIV Antibody Test Counselling Visit Case Files
22300-40	Patient Examination and Treatment - STD Clinic Patient files

CLASSIFICATION SYSTEM CROSS REFERENCES (OTHER RELATED RECORDS):

Communicable Disease Control Services ORCS, section 3, primary 22300.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW

MINISTRY, CROWN CORPORATION OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

DIVISION, BRANCH, SECTION, OR OFFICE:

Community Health, BC Centre for Disease Control, Division of Tuberculosis Control

SYSTEM TITLE:

Tuberculosis Clinic System (TBCS)

APPLICATION TITLE:

Tuberculosis Clinic System (TBCS)

PURPOSE:

The automation of tuberculosis patient information to assist in the treatment of clinic patients, and to maintain a registry of tuberculosis cases in the province for disease surveillance.

INFORMATION CONTENT:

The TBCS contains information necessary to treat clinic patients and to maintain a registry of cases. The patient maintenance screens include patient name, date of birth, place of birth, date of death, cause of death, gender, marital status, address, phone number, health unit number, school district number, ethnicity, immigration status, aboriginal status, aboriginal band membership, occupation, personal health number, physician and other agency addresses, health history, health risks, nurse assessments, radiology correspondence log, other correspondence summary, patient education, clinical interview/notes, treatment, prescriptions, prescription refills, contact lists, skin testing and BCG, mycobacteriology lab reports, diagnosis, radiology reports, admission/discharge information.

The registry screens contain selected patient demographics, diagnosis, date of diagnosis, episode start date, previous diagnosis, case category, type of referral, symptoms, inactivity date, treatment start/end date, type of treatment, treatment start location, drug summaries, reason for prophylactic treatment, compliance with treatment, mycobacteriology lab reports, admission/discharge summaries, health unit and sub-unit number, school district number.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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RETENTION AND DISPOSITION SUMMARY:

The database is retained until superseded or obsolete, and the information contained within it has been migrated to a new format. It is then destroyed.

Manuals (programmer's guide and user's guide) are retained until the database is superseded or obsolete, and then destroyed.

When a patient ceases to attend treatment, the patient file record is updated with the appropriate case management code, and becomes a history file. The file is maintained on the system for statistical and research purposes, or in the case of reactivation of the disease/illness.

For Transitory Electronic Data Processing (EDP) Records, see special schedule 102902.

INPUTS/PROCESSES/OUTPUTS:

INPUTS

Inputs consist of data from paper forms used during patient examination and treatment. Where these forms constitute a signed original document, they are maintained in hard copy on the patient file. Those forms which are transitory input documents are destroyed according to special schedule 102902. Inputs include: physician/clinical input forms (HLTH 805), screening program forms (HLTH 939), private radiology reports, radiological request/consultation (HLTH 816), BCG forms (HLTH 986 I), tuberculin test forms (HLTH 877 I), offer/acceptance/refusal of chemoprophylaxis forms (HLTH 817), and other dictated notes. These forms are classified in Section 4 of the *Communicable Disease Control Services ORCS*, primary 23400:

23400-20	Examination and Treatment of Tuberculosis Patients - Tuberculosis Clinic Patient Files
23400-30	Examination and Treatment of Tuberculosis Patients - Tuberculosis Screening Program Client Files - Adults - Positive and Negative Results
23400-40	Examination and Treatment of Tuberculosis Patients - Tuberculosis Screening Program Client Files - Minors - Positive Results
23400-50	Examination and Treatment of Tuberculosis Patients - Tuberculosis Screening Program Client Files - Minors - Positive Results

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

PROCESSES

Tuberculosis Control Division staff, in co-operation with public health nurses and health unit staff, perform tuberculosis screening on a routine basis and in populations where there is a risk of tuberculosis infection. Patients who have positive skin test results are recommended for x-rays. The division x-ray technicians take the x-ray, and division medical staff and Vancouver Hospital radiologists read and interpret the x-ray. The division medical staff make treatment recommendations. The standing and travelling clinics provide out-patient treatment and read referred film sent at the division's request. All test results, interpretations, recommendations and the course of treatment is recorded on the patient's file. The TB Clinic system allows division staff to enter patient data on the database and generate reports as needed; it also allows selected health unit offices to view patient data and generate patient management reports (clinical notes).

Tuberculosis Control Division staff also conduct epidemiological research and use the TB Clinic system to maintain a registry of active cases, as well as to produce statistical reports.

The utilities function of the system allows division staff to maintain and audit the system by updating the category code lists, running audit reports, purging and archiving data as needed.

OUTPUTS

Outputs consist of statistical and patient management reports. Chest consultation forms (HLTH 840), are placed on the patient file and copied to health units and private physicians where required. They are classified in *Communicable Disease Control Services ORCS* section 4, primaries 23400 and 23700:

23400-20	Examination and Treatment of Tuberculosis Patients - Tuberculosis Clinic Patient Files
23700-40	Tuberculosis Issues, Studies and Reports - Tuberculosis Studies and Reports

Workload statistics and activity reports are generated monthly and on an ad hoc basis and are classified under *ARCS* primaries 440 to 448.

SOFTWARE ENVIRONMENT:

The TBCS was written using Business BASIC.

HARDWARE ENVIRONMENT:

The TBCS runs on a Data General AViiON mainframe computer located at the B.C. Centre for Disease Control in Vancouver.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by Information and Data Management Branch. For assistance in implementing ORCS, contact your Records Officer.

SYSTEM MILESTONES:

The TBCS was implemented January 1, 1990.

USER CONTACT:

Jean Fraser, Registry, Tuberculosis Control Division, 660-6125
Fay Hutton, Data Analyst, Tuberculosis Control Division, 775-2882.

TECHNICAL CONTACT:

Craig Ashton, Application Programming, Health Systems Division, 660-6748

DOCUMENTATION/MANUALS:

Tuberculosis Clinic System Programmer's Guide
Tuberculosis Clinic System User Guide, [no date]

OPERATIONAL RECORDS CLASSIFICATION:

Communicable Disease Control Services ORCS, section 4, primaries 23200 and 23400:

23200-05	Epidemiologic Surveillance of Tuberculosis - Tuberculosis Registry Database
23400-03	Examination and Treatment of Tuberculosis Patients - Tuberculosis Clinic System Patient Database (TBCS)

OTHER RELATED RECORDS:

Communicable Disease Control Services ORCS, section 4, primaries 23200, 23400 and 23700.

SUBJECT HEADINGS

PRIMARY NUMBERS

Communicable Disease Control Services

Operational Records Classification System (ORCS)

I N D E X

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 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.

SUBJECT HEADINGSPRIMARY NUMBERS

- A -

ACQUIRED IMMUNE DEFICIENCY SYNDROME (See AIDS)

ADMISSION WORK CARDS 23400

ADVERSE REACTION SYSTEM

(See also the Information System Overview in the ISO section)

- statistical reports - annual 20420

ADVERSE REACTIONS 20420

(See also IMMUNIZATION)

- surveillance reports 20420

- surveillance report interpretations 20420

AIDS

- annual report 22100

- case report files 22100

- consultation, medical 22700

- education and training 22500

- epidemiology research data 22100

- patient files 22300

- provincial strategy 22800

- research project case files 22800

- statistical reports - quarterly 22100

- subject reference files 22700

- treatment strategies 22800

ANAL SWABS 21160

ANTIBIOTICS

- studies and projects 21400

ARS (See ADVERSE REACTION SYSTEM)

- B -

BACTEC

- isolation worksheets 21140

- output tapes 21140

B.C. NATIVE AIDS AWARENESS PROGRAM

- teaching resources 22520

- workshop 22520

<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
BIOLOGICAL PRODUCTS	
- cost analysis of	20600
- distribution of	20600
- product information	20600
- usage reports	20600
BOTULISM	
-foodborne	21120
- in infants	21120
- C -	
CDSS (See COMMUNICABLE DISEASE SURVEILLANCE SYSTEM)	
CHEMICAL SUPPLY INVENTORY	21200
CHLAMYDIA	
(See also GENERAL BACTERIOLOGY)	
- surveillance forms	22100
COMMUNICABLE DISEASE CONTROL	20000 - 20900
COMMUNICABLE DISEASE SURVEILLANCE SYSTEM	
(See also the CDSS Information System Overview in the ISO section)	
- edit logs	20280
- statistical reports - weekly	20280
- statistical reports - monthly	20280
COMMUNICABLE DISEASES	
- case reports	20280
- subject files	20280
CONSULTATION, MEDICAL	
- on emergency biologicals release	21300
- on medical microbiology problem cases	21300
- on STD/AIDS	22700
CORRESPONDENCE	
- contact tracing, STD	22300
- specialist referrals, STD	22300
CULTURE LOGBOOKS	21700
CULTURES	
- mycobacteria reference	21140
- mycology reference	21150

<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
CURRICULUM DEVELOPMENT	
- STD/AIDS, Ministry of Education	22700
- D -	
DIARIES (See LABORATORY DIARIES)	
DIARRHEAL DISEASE OUTBREAK INVESTIGATIONS (See also ENTERIC BACTERIOLOGY)	21110
DISEASE CONTROL	
- consultation logs	20200
- issues, reports, studies	20200
- research articles and abstracts	20240
- speaking notes and presentation materials	20240
DISEASE DIAGNOSIS	
- research and development	21800
- E -	
EDUCATION AND TRAINING ON STD/AIDS	
- needs assessment	22550
- teaching resources	22550
- workshops	22550
EMERGENCY BIOLOGICAL PRODUCTS	
- procurement and distribution	20630
- release of	20400, 21300
ENTERIC BACTERIOLOGY (See also DIARRHEAL DISEASE OUTBREAK INVESTIGATIONS)	
- test requisitions	21110
- work cards	21110
- worksheets	21110
EXAMINATION AND TREATMENT	
- of STD patients	22300
- of tuberculosis patients	23400
- F -	
FOOD POISONING (See FOOD-BORNE DISEASES)	
FOOD-BORNE DISEASES	21120

SUBJECT HEADINGSPRIMARY NUMBERS

- G -

GEN-PROBE	
- worksheets	21140
GENERAL BACTERIOLOGY	
(See also CHLAMYDIA and GONORRHEA)	
- referred specimen reports	21130
- sensitivity testing results	21130
- test requisitions	21130
- work cards	21130
- worksheets	21130
GONORRHEA	
(See also GENERAL BACTERIOLOGY)	
- surveillance forms	22100

- H -

HANTAVIRUS (See VECTOR-BORNE DISEASES)	
HEMOPHILIA PROGRAM	
- patient medication	20900
- patient registry	20800
HEMOSIDEROSIS PROGRAM	
- patient medication	20900
- patient registry	20800
HIV	
(See also VIROLOGY)	
- antibody test counselling visit case files	22300
HUMAN IMMUNODEFICIENCY VIRUS (See HIV)	

- I -

IMMUNIZATION	
(See also ADVERSE REACTIONS)	
- contra-indications	20400
- of school children	20400
- programs	20450
- techniques	20400
INFECTIVITY TESTING	21700

<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
INFLUENZA SURVEILLANCE SYSTEM (See also the Information System Overview in the ISO Section)	20280
INVENTORY - chemical supply	21200
INVESTIGATIONAL DRUGS - dispensing authorizations	20900
ISSUES - in microbiology - in tuberculosis	21400 23700
- J - - K - - L -	
LABORATORY ACCREDITATION	21600
LABORATORY DIARIES - food poisoning - public health research projects	21120 21700
LABORATORY LOGBOOKS - culture - for food poisonings - for myco cultures for identification - for non-human specimen/referral accessions - for veterinary results - for water bacteriology positive samples	21700 21120 21140 21130 21180 21195
LABORATORY METHODOLOGIES (See LABORATORY TEST EVALUATIONS)	
LABORATORY SERVICES	21000 - 21195
LABORATORY SUPPLIES	21200
LABORATORY SYSTEM (See also the Information System Overview in the ISO Section)	21100
LABORATORY TEST EVALUATIONS	21400

SUBJECT HEADINGS

PRIMARY NUMBERS

LABORATORY TEST REQUISITIONS

- enteric bacteriology	21110
- general bacteriology	21130
- HIV	21190
- mycobacteriology	21140
- mycology	21150
- serology	21170
- syphilis	21170
- virology	21190
- water bacteriology	21195

LABORATORY TEST RESULTS

- for water bacteriology	21195
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LECTURE NOTES AND PRESENTATION MATERIALS

- medical microbiology	22700
- STD/AIDS	22700

LEPROSY PROGRAM

- patient medication	20900
- patient registry	20800

LOGBOOKS (See LABORATORY LOGBOOKS)

LYME DISEASE (See VECTOR-BORNE DISEASES)

- M -

MICROBIOLOGY, MEDICAL

- annual report data	21400
- referrals and consultations	21300

MEDICATION, PATIENT

- for hemophilia program	20900
- for hemosiderosis program	20900
- for leprosy program	20900
- for renal program	20900
- for sexually transmitted diseases	20900
- for tuberculosis	20900

MOTT

- identification worksheets	21140
- sensitivity worksheets	21140

<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
MYCOBACTERIOLOGY	
- BACTEC output tapes	21140
- culture for identification log	21140
- positive smear sheets	21140
- reference cultures	21140
- reference laboratory reports	21140
- test requisitions	21140
- worksheets	21140
MYCOLOGY	
- positive sheets	21150
- reference cultures	21150
- reference laboratory reports	21150
- test requisitions	21150
- worksheets	21150
- N -	
NAP	
- worksheets	21140
NATIONAL REFERENCE CENTRES REPORTS	21110
NON-VIRAL SEROLOGY (See SEROLOGY)	
NOTIFICATION	
- of venereal infection	22300
- of tuberculosis	23200
ORGANISM SEROTYPE INCIDENCE REPORTS	21110
OUTBREAK INVESTIGATIONS	
- of communicable disease	20210, 21700
- of diarrheal disease	21110
- of food poisoning	21120
OUTREACH PROGRAMS (STD)	
- development and analysis	22570
PARASITOLOGY	
- anal swabs	21160
- negative result examinations	21160
- pinworm ledger sheets	21160
- positive result examinations	21160
- worksheets	21160

<u>SUBJECT HEADINGS</u>	<u>PRIMARY NUMBERS</u>
PHARMACY SERVICES	20800 - 20900
PHARMACY SYSTEM (See also the Information System Overview in the ISO section)	20900
PINWORMS (See PARASITOLOGY)	
POLICY (See secondary -00 under the appropriate subject primary)	
POSITIVE SHEETS	
- mycobacteriology smear	21140
- mycology	21150
PROCEDURES (See secondary -00 under the appropriate subject primary)	
PROJECT FILES	
- antibiotic	21400
- disease diagnosis research and development	21800
- public health research	21700
- STD/AIDS clinical research	22800
- tuberculosis research	23700
PUBLIC HEALTH	
- research projects	21700
- STD program development and analysis	22500
- Q -	
QUALITY CONTROL	
- logbooks	21600
- R -	
REFERENCE REPORTS	
- cultures, mycobacteriology	21140
- cultures, mycology	21150
- human, vector-borne diseases	21180
- laboratory, mycobacteriology	21140
- laboratory, mycology	21150
- laboratory, serology	21170
- National Centres, enteric bacteriology	21110
- tick, vector-borne diseases	21180

SUBJECT HEADINGSPRIMARY NUMBERS

REFERENCE MATERIALS

- on disease control	20240
- on microbiology	21400
- on B.C. Native AIDS Awareness Program	22520
- on STD/AIDS	22700 - 22800
- on tuberculosis	23700

REGISTRIES

- of hemophilia program patients	20800
- of hemosiderosis program patients	20800
- of leprosy program patients	20800
- of renal program patients	20800
- of rheumatic fever program patients	20800
- of tuberculosis patients	23200

RENAL PROGRAM

- patient medication	20900
- patient registry	20800

REPORTS

- Adverse Reaction System (ARS) statistical - annual	20420
- adverse reaction surveillance	20420
- AIDS statistical quarterly	22100
- Communicable Disease Surveillance System (CDSS) statistical - monthly	20280
- Communicable Disease Surveillance System (CDSS) statistical - weekly	20280
- food quality	21120
- general bacteriology referred specimen	21130
- HIV statistical - monthly	21190
- human reference	21180
- laboratory test result	21100
- mycobacteriology reference laboratory	21140
- mycology reference laboratory	21150
- National Reference Centres	21100
- organism serotype incidence	21110
- public health research project summary	21700
- serology reference laboratory	21170
- STD/AIDS - annual	22100
- STD control information system statistical	22300
- tick reference	21180
- tuberculosis	23700
- undeliverable test result	21100

SUBJECT HEADINGS

PRIMARY NUMBERS

REQUISITIONS

- biological products	20630
- culture media	21200
- laboratory test	21110 - 21195
- specimen test	21700 - 21800
- veterinary	21180

RHEUMATIC FEVER PROGRAM

- patient medication	20900
- patient registry	20800

RESEARCH AND INVESTIGATION

-AIDS/STD project case files	22800
- Tuberculosis research projects	23700

RESEARCH ARTICLES AND ABSTRACTS

- on microbiology	21400
- on STD/AIDS	22800

- S -

SENSITIVITY WORKSHEETS (see WORKSHEETS)

SEXUALLY TRANSMITTED DISEASE (See STD)

STD

- annual report	22100
- consultation, medical	22700
- contact tracing correspondence	22300
- core program	22800
- education and training	22550
- patient files	22300
- research project case files	22800
- specialist referral correspondence	22300
- subject reference files	22700
- treatment standards and guidelines	22800

STD CONTROL INFORMATION SYSTEM

(See also the Information System Overview in the ISO section)	22300
- statistical reports	22300

STDCIS (See STD CONTROL INFORMATION SYSTEM)

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- mycobacteriology	21140
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- follow-up, tuberculosis	23200
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- on tuberculosis	23700
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SURVEILLANCE, EPIDEMIOLOGIC	
- of reportable diseases	20280
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- for chlamydia	22100
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- for STD/AIDS	22800
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- MOTT sensitivity	21140
- mycobacteriology	21140
- mycology	21150
- NAP	21140
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- tuberculosis	23400
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