

FACILITY DESIGN AND CONSTRUCTION OPERATIONAL RECORDS CLASSIFICATION SYSTEM



GOVERNMENT RECORDS SERVICE

ORCS REGISTER OF AMENDMENTS

This register lists all changes made to the *Facility Design and Construction ORCS* and approved by either the Legislature (formal amendments) or the Public Documents Committee (PDC) Secretary (administrative amendments), in ascending order (i.e., the most recent changes appear first). Each amendment is uniquely identified as follows:

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

For administrative amendments policy and guidelines, see Recorded Information Management (RIM) policy 2-08 entitled "Administrative Amendment of Approved Records Schedules", RIM 02.08 Procedures entitled Administrative Amendment Documentation and Procedures, and *Standard ORCS Kit* chapter 3, section 3.3.

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

Unique identifier (ADAM # or Schedule #)	Date Approved	Section/ Primary/ Secondary	Changes
ADAM 012	2002-05-14	50700-20	Revised SR criteria – no further records to be selected

FACILITY DESIGN AND CONSTRUCTION OPERATIONAL RECORDS CLASSIFICATION SYSTEM



GOVERNMENT RECORDS SERVICE



MAY 01 1997

Schedule
No.
Accession
No.

125812

see ORCS "Introduction"
part 2.6.1 (c)

RECORDS RETENTION AND DISPOSAL AUTHORITY

This is a recommendation to: ☐ Authorize a one-time disposal of the records described below
☒ Establish an ongoing Records Retention and Disposal Schedule
☐ Amend an existing Records Schedule with Schedule No. _____

Record Series, Subject Section, Records Classification System, or Application Title:

Facility Design and Construction Operational Records Classification System

Ministry: **Ministry of Health**
Division: **Regional Programs, Design and Construction Division**
Branch:

Description and Purpose: ☐ Administrative ☒ Operational ☐ Both

The Facility Design and Construction Operational Records Classification System (ORCS) covers all operational records created, received, and maintained by the Design and Construction Division.

These records document the direction, coordination, and financing of all health facility development and maintenance throughout the Province. Health facilities include hospitals, acute, extended and intermediate care facilities, and diagnostic and treatment centres throughout the Province.

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

Dates: **1900/01/01 ongoing**

Physical Format of Records: **see attached schedule**

Extent: **1.0 m3/year** Cubic Metres

No. of
Pieces **n/a**

Have documents been microfilmed?

☒ Yes (some) ☐ No

Is the information in this record series recorded in any other form besides microfilm?

☒ Yes (See Records Management Appraisal) ☐ No

Recommended Retention:

- ☐ Dispose immediately ☐ Dispose on _____ day of _____
☐ Dispose in accord with attached disposal instructions.
☒ Scheduled in accord with attached Records Retention and Disposal Schedule.

Recommended Disposition:

- ☐ Destruction ☐ Full Retention by Archives ☐ Selective Retention by Archives
☒ Scheduled in accord with attached Records Retention and Disposal Schedule.

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:

Director, Executive responsible for records

Date

Deputy Minister/Corporate Executive

Date

Minister

THE PUBLIC DOCUMENTS COMMITTEE CONCURS:

Chairman PDC/Provincial Archivist

Date

THE EXECUTIVE COUNCIL APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE:

O.I.C. Number

Date

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

APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY

ON

Date

OTHER STATUTORY APPROVALS:

Signature

Date

Signature

Date

Title

Title

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

Ministry contact, title, and telephone: **Brent Alley** 952-1205
~~Reid Anderson~~, Director, (250) ~~952-1204~~

These records are created and received under the authority of the *Hospital Act* (RSBC 1979, c. 176), the *Hospital District Finance Act* (RSBC 1979, c. 179), and the *Hospital Insurance Act Regulations* (B.C. Reg. 25/61), and subsequent legislation governing the operational responsibilities and functions of the creating agency.

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

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

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

Upon approval, the *Facility Design and Construction Operational Records Classification System* will supersede two approved ongoing records schedules: schedule 106708, Hospital planning and construction change orders, and schedule 870600, Hospital planning and construction projects.


 Records Analyst

97/04/22
 Date

ARCHIVAL APPRAISAL:

This appraisal documents the recommendation for final disposition.

The final disposition recommendations protect records considered to have archival values.

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

Record series or groups of records which will be retained in part are indicated by "Selective Retention." Selective retention means a sampling, a percentage or statistical sample, or a selection based on recognized archival techniques. For the meaning of selective retention with respect to a specific record series, see the attached schedule.

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

Sheila Norton

17 October 1996

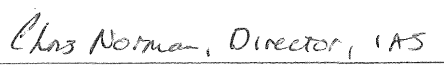
Archivist

Date


 Manager, Appraisal & Acquisition Section

97/04/18
 Date

The undersigned endorse the appraisals and recommendations:


 Deputy Provincial Archivist

Apr. 29/97
 Date


 Ministry Records Officer

97/04/22
 Date

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

Facility Design and Construction

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 Design and Construction Division of the Ministry of Health. The Office of Primary Responsibility (OPR) for all primaries is the Design and Construction Division. The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. The British Columbia Information Management Services (BCIMS) has reviewed the final disposition to ensure that records having residual values to government or historical values are preserved.

These records document the direction, coordination and financing of all health facility development and maintenance as specified by the *Hospital Act* (RSBC 1996, c. 200), the *Hospital District Finance Act* (RSBC 1996, c. 203) and the *Hospital Insurance Act Regulations* (B.C. Reg. 25/61).

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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This *Operational Records Classification System* consists of one section covering the following topics:

Capital Planning
Coordination of Regional Planning
Review and Direction of Functional Programming
Review and Direction of Design and Construction
Cost Control
Financing of all Acute, Extended, and Intermediate Care
Facilities, and Diagnostic and Treatment Centres
in the Province

Unless otherwise specified, records described in this *ORCS* CY+1y 2y DE
will be destroyed three years after the calendar year of their
creation or receipt.

Throughout this *ORCS*, BCIMS will fully retain for their SO 5y FR
evidential value all policy, procedure and standards files
created by the office having primary responsibility for policy,
procedure or standard development and approval. Draft and
duplicate materials that hold no evidential value will be purged
and discarded.

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A SA FD

Section 1

FACILITY DESIGN AND CONSTRUCTION

Records relating to the direction, coordination and financing of all health facility development and maintenance.

BCIMS will fully retain five-year capital plans fourteen years after the fiscal year of their creation	FY+4y	10y	FR
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BCIMS will fully retain multi-level care design guidelines five years after new or revised guidelines are issued.	SO	5y	FR
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BCIMS will fully retain facility master plans files after the information is superseded or obsolete.	SO	nil	FR
--	----	-----	----

BCIMS will fully retain facility working drawings on microfilm after the facility is closed.	SO	nil	FR
--	----	-----	----

BCIMS will fully retain hospital and long-term facility profiles after the facility is closed.	SO	nil	FR
--	----	-----	----

BCIMS will selectively retain facility functional programs after the information is superseded or obsolete.	SO	nil	SR
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BCIMS will selectively retain facility construction project files ten years after the fulfillment of the contractual agreement and completion of the project.	SO+1y	9y	SR
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	<u>A</u>	<u>SA</u>	<u>FD</u>
General capital planning records will be retained for four years after the calendar year of their creation. They will then be destroyed.	CY+2y	2y	DE
Capital project summaries and project cost estimates will be retained until the project information is superseded. They will then be destroyed.	SO	nil	DE
Financial forecasts will be retained for six years after the fiscal year of their creation. They will then be destroyed.	FY+1y	5y	DE
Health Facilities Association of B.C. project approvals and capital by-laws and certificates of approval will be retained for eleven years after the completion of the project. They will then be destroyed.	SO+1y	10y	DE
Letters patent will be retained until their amendment, recall, cancellation, rescindment or reissue. They will then be destroyed.	SO	nil	DE
Regional hospital district budgets will be retained for six years after the fiscal year of their creation. They will then be destroyed.	FY+1y	5y	DE
General capital financing records will be retained for six years after the fiscal year of their creation. They will then be destroyed.	FY+1y	5y	DE

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	<u>A</u>	<u>SA</u>	<u>FD</u>
Data on the Capital Finance System (CFS), the Expenditure Tracking System (ETS) and the Health Facilities Association System (HFAS) electronic databases will be retained until they are converted to another electronic database system.	SO	nil	DE
Certificate of approval status reports and HFAS summary reports will be retained until the information is revised or updated. They will then be destroyed.	SO	nil	DE
Daily outstanding balances and discrepancy reports will be retained for one month, then destroyed.	1m	nil	DE
Debt servicing invoice will be retained for six years after the fiscal year of their creation. They will then be destroyed.	FY+1y	5y	DE
Greater Vancouver Regional Hospital District expenditure reports will be destroyed the year after the fiscal year in which they were created.	FY+1y	nil	DE
Interim interest billings will be retained for twenty-six years after the fiscal year of their creation. They will then be destroyed.	FY+1y	25y	DE
Schedule C and D contracts will be retained for seven years after the expiry of the certificate of approval. They will then be destroyed.	SO+1y	6y	DE
Closed RHD and the Health Facilities Association certificates will be retained for twenty-six years after the fiscal year in which the project is completed and the certificate of approval account is closed. They will then be destroyed.	FY+1y	25y	DE

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	<u>A</u>	<u>SA</u>	<u>FD</u>
Auto-debit invoices and correspondence will be retained for six years after the fiscal year of their creation. They will then be destroyed.	FY+1y	5y	DE
Debenture repayment schedules will be retained until the information is revised or updated. They will then be destroyed.	SO	nil	DE
Debenture files and debenture certification and transfer of assets will be retained for seven years after the maturity of the debenture. They will then be destroyed.	SO+1y	6y	DE
RHD and Health Facilities Association financial case files will be retained for seven years after the maturity of the debentures. They will then be destroyed.	SO+1y	6y	DE
Banking agreements will be retained for seven years after the expiry of the agreement and the conclusion of any audit requirements. They will then be destroyed.	SO+1y	6y	DE
General records relating to Health Facilities Association capital financing projects, electronic funds transfer (EFT) confirmations, current year expenditure reports and remaining authorized reports will be retained for six years after the fiscal years of their creation. They will then be destroyed.	FY+1y	5y	DE
Banking information will be retained for seven years after the certificate of approval expires. They will then be destroyed.	SO+1y	6y	DE

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	<u>A</u>	<u>SA</u>	<u>FD</u>
Claims for major and Treasury Board minor cost-shared construction projects will be retained for twenty-one years after the completion of the project. They will then be destroyed.	SO+1y	20y	DE
Grant applications and claims for minor capital construction projects carried out at acute/extended care and intermediate care facilities will be retained for seven years after the completion of the project. They will then be destroyed.	SO+1y	6y	DE
Claims for major and Treasury Board minor non-cost-shared construction projects will be retained for seven years after the completion of the project. They will then be destroyed.	SO+1y	6y	DE
Consultant eligibility lists and consultant selection criteria will be retained until information is updated or is no longer current. They will then be destroyed.	SO	nil	DE
Canadian Construction Documents Committee standards and provincial and national building codes will be retained until new or revised standards are issued. They will then be destroyed.	SO	nil	DE
Design guideline development files will be retained for three years after new or revised guidelines are issued. They will then be destroyed.	SO+1y	2y	DE
Seismic assessments will be retained until new or additional studies are completed. They will then be destroyed.	SO	nil	DE
Engineering guideline development files will be retained for three years after new or revised guidelines are issued. They will then be destroyed.	SO+1y	2y	DE

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	<u>A</u>	<u>SA</u>	<u>FD</u>
Initial facility design drawings are retained for one year after the design is revised or updated. They are then destroyed.	SO+1y	nil	DE
Facility working drawings on paper are retained for one year after the project is completed, the original plans have been microfilmed and the microfilm quality verified. They are then destroyed.	SO+1y	nil	DE
Facility working drawings created using computer assisted drafting (CAD) will be retained until the facility is closed. They are then destroyed.	SO	nil	DE
Facility specifications will be retained for eight years after the fulfillment of the contractual agreement and completion of the project. They are then destroyed.	SO+1y	7y	DE
Project change orders are retained for seven years after the fulfillment of the contractual agreement and completion of the project. They are then destroyed.	SO+1y	6y	DE
Unsuccessful tender bids are retained for six years after the calendar year of their creation. They are then destroyed.	CY	6y	DE

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A SA FD

SECTION 1

FACILITY DESIGN AND CONSTRUCTION

PRIMARY NUMBERS

5 0 0 0 0 - 5 0 9 9 9

Section 1 covers records relating to the direction, coordination and financing of all health facility development and maintenance as specified by the *Hospital Act* (RSBC 1996, c. 200), the *Hospital District Act* (RSBC 1996, c. 202), the *Hospital District Finance Act* (RSBC 1996, c. 203), and the *Hospital Insurance Act Regulations* (B.C. Reg. 25/61). This includes records relating to: capital planning; the coordination of regional planning; the review and direction of functional programming; the review and direction of design and construction; cost control; and obtaining financing for all acute, extended, and intermediate care facilities, and diagnostic and treatment centres throughout the Province.

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50000 - FACILITY DESIGN AND CONSTRUCTION - 50999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

- 50000 FACILITY DESIGN AND CONSTRUCTION - GENERAL
- 50100 CAPITAL PLANNING - GENERAL
- 50130 - BUDGET ALLOCATIONS AND PRIORITIES
- 50150 - PROJECT APPROVALS
- 50170 - REGIONAL HOSPITAL DISTRICT BUDGETS
- 50200 CAPITAL FINANCING - GENERAL
- 50230 - CERTIFICATES OF APPROVAL
- 50250 - DEBENTURES
- 50270 - FINANCIAL MANAGEMENT
- 50290 - HEALTH FACILITIES ASSOCIATION PROJECTS
- 50300 CONSTRUCTION EXPENDITURES - GENERAL
- 50330 - COST-SHARED PROJECTS
- 50350 - MINOR CAPITAL PROJECTS
- 50370 - NON-COST-SHARED PROJECTS
- 50400 DESIGN CONSULTANTS
- 50450 DESIGN STANDARDS AND GUIDELINES
- 50500 ENGINEERING STANDARDS AND GUIDELINES

(Continued on next page)

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50100 CAPITAL PLANNING - GENERAL

For five-year capital plans, see primary 50130.

CY+2y 2y DE

CY+2y nil DE

SO	5y	FR
SO	nil	DE

-01 General
-02 B.C. 21 program
-03 Energy conservation funding
-04 Equipment funding
-05 Native health funding

5y = This ensures that the primary operational requirements of the creating agency are met.

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50130 CAPITAL PLANNING - BUDGET ALLOCATIONS AND PRIORITIES

Records relating to planning priorities for the allocation of major, Treasury Board minor, and minor capital budgets. This includes budget cost estimates for ongoing projects (HLTH 1553), cash flows, expenditure forecasts, summaries of approved projects, and other material included in the preparation and coordination of the five-year capital plan. Includes correspondence, memoranda, financial estimates and reports.

For financial reports, statements and statistics, see *ARCS* primary 1180.

For other ministry budgets, see *ARCS* primaries 1010 to 1015.

For regional hospital district budgets, see primary 50170.

Unless otherwise specified below, the ministry OPR (Design and Construction 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	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Capital project summaries		SO	nil	DE

SO = when project information is superseded

(Continued on next page)

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50130 CAPITAL PLANNING - BUDGET ALLOCATIONS AND PRIORITIES (Continued)

-03 Project cost estimates (HLTH 1553) SO nil DE

SO = when project information is superseded

-04 Financial forecasts FY+1y 5y DE

7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years.

-05 Five-year capital plans FY+4y 10y FR

15y = The five year capital plan is a Treasury Board submission document. This retention ensures compliance with the *Freedom of Information and Protection of Privacy Act* (RSBC 1996, c.165, s.12).

FR = BCIMS will fully retain five-year capital plans because of their significant historical and evidential value.

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50150 CAPITAL PLANNING - PROJECT APPROVALS

Records relating to the approval of funding for health facility construction and renovation projects. Includes copies of certificates of approval and capital by-laws, notices to facilities of project approval, requests for and copies of special resolutions of the Health Facilities Association of British Columbia.

Unless otherwise specified below, the ministry OPR (Design and Construction 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	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Health Facilities Association of B.C. project approvals		SO+1y	10y	DE

SO = upon completion of the project

-20	Capital by-laws and certificates of approval (arrange by regional hospital district)		SO+1y	10y	DE
-----	---	--	-------	-----	----

SO = upon completion of the project

11y = These records retain primary operational, fiscal, legal and audit values for a period of 11 years.

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A	SA	FD
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
13	13	13
14	14	14
15	15	15
16	16	16
17	17	17
18	18	18
19	19	19
20	20	20
21	21	21
22	22	22
23	23	23
24	24	24
25	25	25
26	26	26
27	27	27
28	28	28
29	29	29
30	30	30
31	31	31
32	32	32
33	33	33
34	34	34
35	35	35
36	36	36
37	37	37
38	38	38
39	39	39
40	40	40
41	41	41
42	42	42
43	43	43
44	44	44
45	45	45
46	46	46
47	47	47
48	48	48
49	49	49
50	50	50
51	51	51
52	52	52
53	53	53
54	54	54
55	55	55
56	56	56
57	57	57
58	58	58
59	59	59
60	60	60
61	61	61
62	62	62
63	63	63
64	64	64
65	65	65
66	66	66
67	67	67
68	68	68
69	69	69
70	70	70
71	71	71
72	72	72
73	73	73
74	74	74
75	75	75
76	76	76
77	77	77
78	78	78
79	79	79
80	80	80
81	81	81
82	82	82
83	83	83
84	84	84
85	85	85
86	86	86
87	87	87
88	88	88
89	89	89
90	90	90
91	91	91
92	92	92
93	93	93
94	94	94
95	95	95
96	96	96
97	97	97
98	98	98
99	99	99
100	100	100

50200 CAPITAL FINANCING - GENERAL

Records relating to the financing of hospital construction and renovation projects as specified by the *Hospital District Act* (RSBC 1996, c. 202), and the *Hospital District Finance Act* (RSBC 1996, c. 203) not shown elsewhere in the capital financing block. This includes records relating to short-term borrowing, non-certificate of approval financing, and revenue accounts. Includes correspondence, memoranda, agreements and reports.

For audits, see *ARCS* primary 975.

For capital project summaries, see primary 50130.

For construction expenditures, see primaries 50300 to 50370.

For financial management reports, statements and statistics,
see *ARCS* primary 1180.

For ongoing accruals and reconciliations, see *ARCS* primary 910.

Unless otherwise specified below, the ministry OPR (Design and Construction Division) will retain these records for:

FY+1y 5y 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

SO	5y	FR
SO	nil	DE

-01 General

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
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OPR = Office of Primary Responsibility		w = week m = month y = year
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BCIMS = B.C. Information Management Services		SO = Superseded or Obsolete

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50200 CAPITAL FINANCING - GENERAL (Continued)

-02	CEP (Capital Expense Proposal)	SO+1y	6y	DE
-----	--------------------------------	-------	----	----

SO = when all projects financed under this program are completed and all financial obligations are met

7y = This will ensure that records are retained for audit purposes.

- 03 Parking revenue
- 04 Short-term loan payments
- 05 Temporary borrowing
- 06 Treasury correspondence

7y = These records retain primary operational, legal, fiscal and audit values for a period of seven years.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50230 CAPITAL FINANCING - CERTIFICATES OF
 APPROVAL (Continued)

-03	Capital Finance System (CFS) (electronic database)	SO	NA	NA
-----	---	----	----	----

SO = upon conversion to another database

NA = data is transferred upon database conversion

NOTE: For more information on the Capital Finance System, see the Information System Overview in the ISO Section.

-04	Certificate of approval status reports	SO	nil	DE
-----	--	----	-----	----

SO = when information is revised or updated

-05	Daily outstanding balance reports	1m	nil	DE
-----	-----------------------------------	----	-----	----

-06	Daily discrepancy reports	1m	nil	DE
-----	---------------------------	----	-----	----

-07	Debt servicing invoices	FY+1y	5y	DE
-----	-------------------------	-------	----	----

7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years.

-08	Expenditure Tracking System (electronic database)	SO	nil	DE
-----	--	----	-----	----

SO = upon conversion to another database

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
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FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
PIB = Personal Information Bank	VR = Vital Records	PUR = Public Use Records
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50230 CAPITAL FINANCING - CERTIFICATES OF
 APPROVAL (Continued)

NOTE: For more information on the Expenditure Tracking System, see the Information System Overview in the ISO Section.

- | | | | |
|-----|--|-------------|----|
| -09 | Greater Vancouver RHD expenditure reports | FY+1y nil | DE |
| -10 | Interim interest billing | FY+1y 25y | DE |
| | 27y = These records retain primary operational, fiscal, legal and audit values for a period of twenty-seven years. | | |
| -11 | Schedule C contracts | SO+1y 6y | DE |
| | SO = upon expiry of the certificate of approval | | |
| | 7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years. | | |
| -12 | Schedule D contracts | SO+1y 6y | DE |
| | SO = upon expiry of the certificate of approval | | |
| | 7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years. | | |

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50230 CAPITAL FINANCING - CERTIFICATES OF
APPROVAL (Continued)

NA = Reclassify to secondary -50 when account is closed.

-50 Closed Health Facility Association certificates FY+1y 25y DE

27y = Certificates of approval retain their operational and audit value until any debentures have matured. Debentures are issued for periods of up to 20 years.

DE = Certificates of approval have no residual archival value.

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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50250 CAPITAL FINANCING - DEBENTURES

CY+1y 2y DE

SO nil DE

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

FY+1y 5y DE

FY+1y 5y DE

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50250 CAPITAL FINANCING - DEBENTURES (Continued)

7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years.

-04	Debenture repayment schedules	SO	nil	DE
-----	-------------------------------	----	-----	----

SO = when information is revised or updated

-20	Debenture files (arrange by debenture series number)	SO+1y	6y	DE
-----	---	-------	----	----

SO = upon maturity of the debenture

-30	Debenture certification and transfer of assets (arrange by debenture series number)	SO+1y	6y	DE
-----	--	-------	----	----

SO = upon maturity of the debenture

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
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50270 CAPITAL FINANCING - FINANCIAL MANAGEMENT

CY+1y 2y DE

SO nil DE

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

SO+1y 6y DE

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

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SO = upon maturity of debentures

SECT 1 - 21

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50290 CAPITAL FINANCING - HEALTH FACILITIES
 ASSOCIATION PROJECTS

Records relating to payments made to facilities for design and construction projects funded by the Health Facilities Association of British Columbia according to the *Hospital Insurance Act Regulations* (BC Reg. 25/61). Includes agreements with banks for electronic funds transfers (EFT), EFT confirmation reports, expenditure monitoring, correspondence, memoranda and electronic database records.

For certificates of approval, see primary 50230.
For construction expenditure invoices, see primary 50370.
For special resolutions, see primary 50150.

Unless otherwise specified below, the ministry OPR (Design and Construction Division) will retain these records for:

FY+1y 5y 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	Health Facilities Association System (HFAS) (electronic database)		SO	nil	DE

SO = upon conversion to another database

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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BCIMS = B.C. Information Management Services		SO = Superseded or Obsolete

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50290 CAPITAL FINANCING - HEALTH FACILITIES
 ASSOCIATION PROJECTS (Continued)

- | | | | | |
|-----|--|-------|-----|----|
| -03 | HFAS summary reports | SO | nil | DE |
| | SO = when information is superseded or obsolete | | | |
| -04 | Banking agreements | SO+1y | 6y | DE |
| | SO = upon expiry of the agreement and conclusion of any audit requirements | | | |
| -05 | Banking information
(includes facility key data reports) | SO+1y | 6y | DE |
| | SO = when certificate of approval expires | | | |
| -06 | EFT confirmations | | | |
| -07 | Current year expenditure report | | | |
| -08 | Remaining authorized report | | | |

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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BCIMS = B.C. Information Management Services		SO = Superseded or Obsolete

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50300 CONSTRUCTION EXPENDITURES - GENERAL

Records relating to applying and claiming for funding for construction and renovation projects not shown elsewhere in this block. Includes correspondence and memoranda.

Unless otherwise specified below, the ministry OPR (Design and Construction 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

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

-01 General

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50330 CONSTRUCTION EXPENDITURES - COST-SHARED
PROJECTS (Continued)

7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years.

-30	Claims for major projects (arrange by location, then by project number)	SO+1y	6y	DE
-----	--	-------	----	----

SO = upon completion of the project

7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years.

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

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7y = These records retain primary operational, fiscal, legal and audit values for a period of seven years.

SECT 1 - 28

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50370 CONSTRUCTION EXPENDITURES - NON-COST-
SHARED PROJECTS (Continued)

7y = These records retain primary operational,
 fiscal, legal and audit values for
 a period of seven years.

-30 Claims for Treasury Board minor projects SO+1y 6y DE

SO = upon completion of the project

7y = These records retain primary operational,
 fiscal, legal and audit values for a period of
 seven years.

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50400 DESIGN CONSULTANTS

For bids on tendered projects, see primary 50670.

CY+1y 2y DE

SO nil DE

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

SO nil DE

SO nil DE

SO = when information is updated

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
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FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
PIB = Personal Information Bank	VR = Vital Records	PUR = Public Use Records
BCIMS = B.C. Information Management Services		SO = Superseded or Obsolete

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50400 DESIGN CONSULTANTS (Continued)

-04 Canadian Construction Documents Committee standards SO nil DE

SO = when new or revised standards are issued

-05 Architects correspondence

-06 Engineers correspondence

-07 Quantity surveyors correspondence

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
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50450 DESIGN STANDARDS AND GUIDELINES

CY+1y 2y DE

SO nil DE

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

SO nil DE

SO nil DE

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD50450 DESIGN STANDARDS AND GUIDELINES (Continued)

SO = when new or revised code is issued

-04	Multi-level care design guidelines	SO	5y	FR
-----	------------------------------------	----	----	----

SO = when new or revised guidelines are issued

5y = This retention period ensures that guidelines are maintained for consultation and review.

FR = BCIMS will retain one copy of each edition of *Multi-level care design guidelines* for evidential value. Draft and duplicate materials may be purged and discarded.

-20	Design guideline development files (arrange alphabetically by subject)	SO+1y	2y	DE
-----	---	-------	----	----

SO = when new or revised guidelines are issued

3y = This retention period ensures that records are maintained for consultation and review.

-30	Seismic assessments (arrange by location)	SO	nil	DE
-----	--	----	-----	----

SO = when new or additional studies are completed

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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50500 ENGINEERING STANDARDS AND GUIDELINES

CY+1y 2y DE

SO nil DE

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

-20 Engineering guidelines development files

SO+1y 2y DE

SO = when new or revised guidelines are issued

3y = This retention period ensures that records are retained for consultation and review.

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50600 PROJECT REVIEW - GENERAL

Records relating to health facility design and construction projects not shown elsewhere in this primary block.

Unless otherwise specified below, the ministry OPR (Design and Construction 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
		- <u>non-OPR</u>
-01	General	

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A	SA	FD
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100	100	100

50630 PROJECT REVIEW - PLANS AND PROGRAMS

Records relating to the identification of health care delivery goals, the definition of operating concepts, projected workloads and the space requirements for facilities to meet defined goals, from which specific construction projects may be planned. These are prepared by individual health facilities and submitted to the ministry. Includes correspondence, memoranda, briefing notes, feasibility studies, census data, site assessments, organization charts, mission statements and other related documents.

For capital planning, see primaries 50100 to 50700.

Unless otherwise specified below, the ministry OPR (Design and Construction 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
-01 General - non-OPR

SO	5y	FR
SO	nil	DE

-20 Facility functional programs
(arrange alphabetically by location)

SO nil SR

SO = when the information is superseded or obsolete

(Continued on next page)

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50650 PROJECT REVIEW - DESIGN PROJECTS (Continued)

SO = when design is revised or updated

VR	-30	Facility working drawings (arrange alphabetically by location) (paper)	SO+1y	nil	DE
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SO = when projects are complete, the original plans are microfilmed and, once microfilm quality has been verified, the originals are destroyed

(microfilm)	SO	nil	FR
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SO = when facility is closed

FR = BCIMS will fully retain microform copies of facility plans for their historical value. This information in a compact form and in a media suitable for long term retention, containing information regarding large and important historic buildings, has sufficient archival value to warrant retention.

(computer-assisted drafting)	SO	nil	DE
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SO = when facility is closed

NOTE: One microfilm copy of all facility plans is to be stored in a safe and separate location, in case of emergency or disaster.

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
FD = Final Disposition	NA = Not Applicable	FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility		w = week m = month y = year
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BCIMS = B.C. Information Management Services		SO = Superseded or Obsolete

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

50700 PROJECT REVIEW - CONSTRUCTION PROJECTS

Records relating to the review and direction of all aspects of specific health facility planning, construction, and renovation projects throughout the province according to the *Hospital Act* (RSBC 1996, c. 200), the *Hospital District Finance Act* (RSBC 1996, c. 203) and the *Building Safety Standards Act* (RSBC 1996, c. 42). Includes all contracts and agreements, financing approvals, cost estimates, design approvals, construction authorizations, correspondence, memoranda, equipment lists, and agenda and minutes of the Project Building Committee (major projects only), for all major and Treasury Board minor projects.

For architectural drawings, see primary 50650.

For change orders, see primary 50650.

For construction of ministry buildings, see *ARCS* primary 545.

For master plans and functional programs, see primary 50630.

For project specifications, see primary 50650.

For summaries of completed projects, see primary 50690.

Unless otherwise specified below, the ministry OPR (Design and Construction 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
		- <u>non-OPR</u>

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

(Continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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50700 PROJECT REVIEW - CONSTRUCTION PROJECTS

(Continued)

-01 General

-20	Facility construction project case files (arrange by location, then project number)	SO+1y 9y	SR
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NOTE: Offices should classify documentation under this secondary unless they have sufficient volume to warrant classifying it in the secondaries listed below.

- 21 Facility construction projects - general
- 23 Facility construction projects - approval files
- 25 Facility construction projects - correspondence
- 27 Facility construction projects - Building Committee
- 29 Facility construction projects - Treasury Board minor projects

SO = upon fulfilment of the contractual agreement
and completion of the project

NOTE: The Design and Construction Division will use ongoing accession number 91-0334 to send facility construction project case files off-site.

(Continued on next page)

A = Active	CY = Calendar Year	DE = Destruction
SA = Semi-active	FY = Fiscal Year	SR = Selective Retention by BCIMS
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7y = This will ensure records are retained until the expiration of the right 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.

SECT 1 - 44

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 the British Columbia Information Management Services. For assistance in implementing *ORCS*, contact your Records Officer.

50800 PROJECT REVIEW - FACILITY PROFILES

CY+1y 2y DE

SO nil DE

SO	5y	FR
<u>SO</u>	<u>nil</u>	<u>DE</u>

(Continued on next page)

C:\WP\DCON:97/07/29 Schedule 125812 ORCS/FDC SECT 1 - 45

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 the British Columbia Information Management Services. For assistance in implementing *ORCS*, contact your Records Officer.

A SA FD

50800 DESIGN AND CONSTRUCTION PROJECT REVIEW -
 FACILITY PROFILES (Continued)

SO = upon closure of the facility

FR = BCIMS will fully retain facility profiles for
 their informational value.

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

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 the British Columbia Information Management Services. For assistance in implementing *ORCS*, contact your Records Officer.

A SA FD

INFORMATION SYSTEM OVERVIEW

1. MINISTRY, CROWN CORPORATION, OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

2. DIVISION, BRANCH, SECTION, OR OFFICE:

Design and Construction Division

3. SYSTEM TITLE:

Capital Finance System (CFS)

4. APPLICATION TITLE:

Capital Finance System (CFS)

5. PURPOSE:

The purpose of CFS is to monitor certificates of approval used to finance major and Treasury Board minor health facility construction projects.

6. INFORMATION CONTENT:

CFS maintains certificate of approval and project information including the name of the regional hospital district, electoral district, health unit, regional hospital district treasurer, health facility name, project manager, certificate amount, expiry date, bank account number, outstanding balances, debenture information, non-scheduled payments, electronic funds transfers (EFT), and invoices.

7. RETENTION AND DISPOSITION SUMMARY

The CFS database is retained until superseded or obsolete, and then destroyed.

CFS user manuals and programmer specifications are retained until the database is superseded or obsolete, and then destroyed.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

Daily backups are stored on diskette. The information on the diskette is stored for 1 cycle. Weekly backups are stored on diskette and the information is stored for 4 cycles. Data is purged from the system after 2 fiscal years.

For transitory Electronic Data Processing (EDP) records, see schedule number 102902.

8. INPUTS/PROCESSES/OUTPUTS

INPUTS

Inputs consist of data contained in the certificate of approval contract and certificate of approval daily bank balances downloaded from the Provincial Treasury. When expenditures have been made and processed on the Expenditure Tracking System, the updated bank balances are exported to CFS.

PROCESSES

When a design and construction project is approved and a certificate of approval is opened, a new file is created on CFS. CFS monitors the project expenditures and creates invoices for the regional hospital districts to pay their share of the construction costs.

OUTPUTS

Outputs consist of quarterly invoices sent to the regional hospital district, and monthly interim interest billings, also sent to the regional hospital district. Key data and project reports are generated on an ad hoc basis to give a summary of the project and its progress. These are maintained on the certificate of approval file. Daily discrepancy and outstanding balance reports are reconciled daily. Outputs are classified in *Facility Design and Construction ORCS*, section 1, primary 50230:

50230-05 Capital financing - Certificates of Approval - Daily Outstanding Balance Reports

50230-06 Capital Financing - Certificates of Approval - Daily Discrepancy Reports

50230-07 Capital financing - Certificates of approval - Debt servicing invoices

50230-09 Capital Financing - Certificates of Approval - Interim Interest Billings

50230-20 Capital Financing - Certificates of Approval - RHD Certificates

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

9. SOFTWARE ENVIRONMENT

CFS was written in Nantucket's CLIPPER.

10. HARDWARE ENVIRONMENT

CFS runs on a NEC PowerMate 450 es personal computer located at the Design and Construction Division in Victoria.

11. SYSTEM MILESTONES

CFS was first designed and implemented in 1987-88.

12. USER CONTACT

Anne Evans, Financial Officer, Design and Construction Division, 952-1247.

13. TECHNICAL CONTACT:

Randy Slemko, Programmer/Analyst, 952-0897.

14. DOCUMENTATION/MANUALS CROSS REFERENCES:

Capital Payment Clerk Procedure Manual [no date]
Programmer specifications

15. OPERATIONAL RECORDS CLASSIFICATION:

Facility Design and Construction ORCS, section 1, primary 50230:

50230-03 Capital Financing - Certificates of Approval - Capital Finance System

16. OTHER RELATED RECORDS:

Facility Design and Construction ORCS, section 1, primary 50230:

50230 Capital Financing - Certificates of Approval

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

INFORMATION SYSTEM OVERVIEW

1. MINISTRY, CROWN CORPORATION, OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

2. DIVISION, BRANCH, SECTION, OR OFFICE:

Design and Construction Division

3. SYSTEM TITLE:

Expenditure Tracking System (ETS)

4. APPLICATION TITLE:

Expenditure Tracking System (ETS)

5. PURPOSE:

The purpose of ETS is to monitor expenditures from Greater Vancouver Regional Hospital District certificates of approval and for Health Facilities Association funded design and construction projects.

6. INFORMATION CONTENT:

ETS maintains certificate of approval number, certificate type, expiry date, RHD code, HLTH 1553 information (budget status reports) and expenditure information (i.e., what has been paid, what has been debentured).

7. RETENTION AND DISPOSITION SUMMARY

The ETS database is retained until superseded or obsolete, and then destroyed.

ETS user manuals and programmer specifications 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 the British Columbia Information Management Services. For assistance in implementing *ORCS*, contact your Records Officer.

A SA FD

Daily backups are stored on diskette. The information on the diskette is stored for 1 cycle. Weekly backups are stored on diskette and the information is stored for 4 cycles. Data is purged from the system after 2 fiscal years.

For transitory Electronic Data Processing (EDP) records, see schedule number 102902.

8. INPUTS/PROCESSES/OUTPUTS

INPUTS

Inputs consist of weekly reports from the GVRHD, all invoices submitted by facilities for payment, certificate of approval information, HLTH 1553 budget status report information, paydowns, and credits.

50230-06 Capital Financing - Certificates of Approval - Daily Discrepancy Reports

50370-20 Construction Expenditures - Non-cost Shared Projects - Claims for Major Projects

50370-30 Construction Expenditures - Non-cost Shared Projects - Claims for Treasury Board Minor Projects

PROCESSES

The Greater Vancouver Regional Hospital District has one bank account from which it pays its share of expenses for many design and construction projects. It uses the certificates of approval to reimburse these expenditures. The GVRHD sends a weekly report to the Design and Construction Division identifying where the money has been spent so the division can ensure the funds are being spent appropriately.

The Health Facilities Association also has one bank account for all Continuing Care, Extended Care and Hospital Programs projects. The regional hospital districts send design and construction expenditure invoices along with HLTH 1553 budget status reports for payment. When the payments have been approved, an electronic funds transfer is initiated. ETS enables Design and Construction staff to monitor these expenditures and the status of the certificates of approval.

OUTPUTS

Outputs consist of certificate of approval balances and interest charges, which are exported to CFS, and weekly certificate of approval status reports, remaining authorized

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

reports, and current year expenditure reports. These are classified in the *Facility Design and Construction ORCS* as follows:

- 50230-04 Capital Financing - Certificates of Approval - Certificate of Approval Status Reports
- 50290-07 Capital financing - Health Facilities Association Projects - Current year expenditure report
- 50290-08 Capital Financing - Health Facilities Association Projects - Remaining authorized report

9. SOFTWARE ENVIRONMENT

ETS was written in Nantuckett's CLIPPER.

10. HARDWARE ENVIRONMENT

ETS runs on a NEC PowerMate 450 es personal computer located at the Design and Construction Division in Victoria.

11. SYSTEM MILESTONES

The ETS system was designed and implemented in 1987-1988.

12. USER CONTACT

Anne Evans, Financial Officer, Design and Construction Division, 952-1247.

13. TECHNICAL CONTACT:

Randy Slemko, Programmer/Analyst, 952-0897.

14. DOCUMENTATION/MANUALS CROSS REFERENCES:

Capital Payment Clerk Procedure Manual [no date]
Programmer specifications

15. OPERATIONAL RECORDS CLASSIFICATION:

Facility Design and Construction ORCS, section 1, primary 50230:

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 the British Columbia Information Management Services. For assistance in implementing *ORCS*, contact your Records Officer.

A SA FD

50230-08 Capital Financing - Certificates of Approval - Expenditure Tracking System

16. OTHER RELATED RECORDS:

Facility Design and Construction ORCS, section 1, primary 50230:

50230 Capital Financing - Certificates of Approval

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 the British Columbia Information Management Services. For assistance in implementing *ORCS*, contact your Records Officer.

A SA FD

INFORMATION SYSTEM OVERVIEW

1. MINISTRY, CROWN CORPORATION, OR AGENCY:

Ministry of Health and Ministry Responsible for Seniors

2. DIVISION, BRANCH, SECTION, OR OFFICE:

Design and Construction Division

3. SYSTEM TITLE:

Health Facilities Association System (HFAS)

4. APPLICATION TITLE:

Health Facilities Association System

5. PURPOSE:

The purpose of the HFAS is to enable payments to facilities via electronic funds transfer (EFT) for Health Facilities Association funded design and construction projects.

6. INFORMATION CONTENT:

The HFAS contains certificate of approval number, project number, name of facility and society, name of contact person, bank, transit number, and account number.

7. RETENTION AND DISPOSITION SUMMARY

The HFAS database is retained until superseded or obsolete, and then destroyed.

HFAS user manuals and programmer specifications are retained until the database is superseded or obsolete, and then destroyed.

Daily backups are stored on diskette. The information on the diskette is stored for 1 cycle. Weekly backups are stored on diskette and the information is stored for 4 cycles. Data is purged from the system after 2 fiscal years.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

For transitory Electronic Data Processing (EDP) records, see schedule number 102902.

8. INPUTS/PROCESSES/OUTPUTS

INPUTS

Inputs consist of data from the certificate of approval and bank account information from a voided cheque.

PROCESSES

The health facility submits invoices to the Design and Construction Division for payment. These are classified in the *Facility Design and Construction ORCS* under primary 50370 - Construction Expenditures - Non-cost shared projects. When these invoices have been approved for payment, the HFAS creates an electronic funds transfer which is downloaded to the Provincial Treasury which fulfils the transaction. The facility is notified that the payment has been made to its account and informs it of the remaining funds available in the certificate of approval account.

OUTPUTS

Outputs consist of electronic funds transfers which are downloaded to the Provincial Treasury, letters to the facilities notifying them of the status of their account (which are maintained on the certificate of approval file), summary reports, and key data reports which are filed with other banking information. These are classified in the *Facility Design and Construction ORCS* as follows:

50230-40 Capital Financing - Certificates of Approval - Health Facilities
Association Certificates

50290-05 Capital Financing - Health Facilities Association Projects - Banking
Information

9. SOFTWARE ENVIRONMENT

The HFAS was written in Nantuckett's CLIPPER.

10. HARDWARE ENVIRONMENT

HFAS runs on a NEC PowerMate 450 es personal computer located at the Design and Construction Division in Victoria.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

11. SYSTEM MILESTONES

The HFAS was designed and implemented in 1987-1988.

12. USER CONTACT

Anne Evans, Financial Officer, Design and Construction Division, 952-1247.

13. TECHNICAL CONTACT:

Randy Slemko, Programmer/Analyst, 952-0897.

14. DOCUMENTATION/MANUALS CROSS REFERENCES:

Capital Payment Clerk Procedure Manual [no date]
Programmer specifications

15. OPERATIONAL RECORDS CLASSIFICATION:

Facility Design and Construction ORCS, section 1, primary 50290

50290-02 Health Facilities Association System

16. OTHER RELATED RECORDS:

Facility Design and Construction ORCS, section 1:

- 50230-40 Capital Financing - Certificates of Approval - Health Facilities Association Certificates
- 50290-05 Capital Financing - Health Facilities Association Projects - Banking Information
- 50370-20 Construction Expenditures - Non-cost Shared Projects - Claims for Major Projects
- 50370-30 Construction Expenditures - Non-cost Shared Projects - Claims for Treasury Board Minor Projects

SUBJECT HEADINGS

PRIMARY NUMBERS

Facility Design and Construction

Operational Records Classification System (ORCS)

I N D E X

This index provides an alphabetical guide to *ORCS* subject headings and relevant primary numbers(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.

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