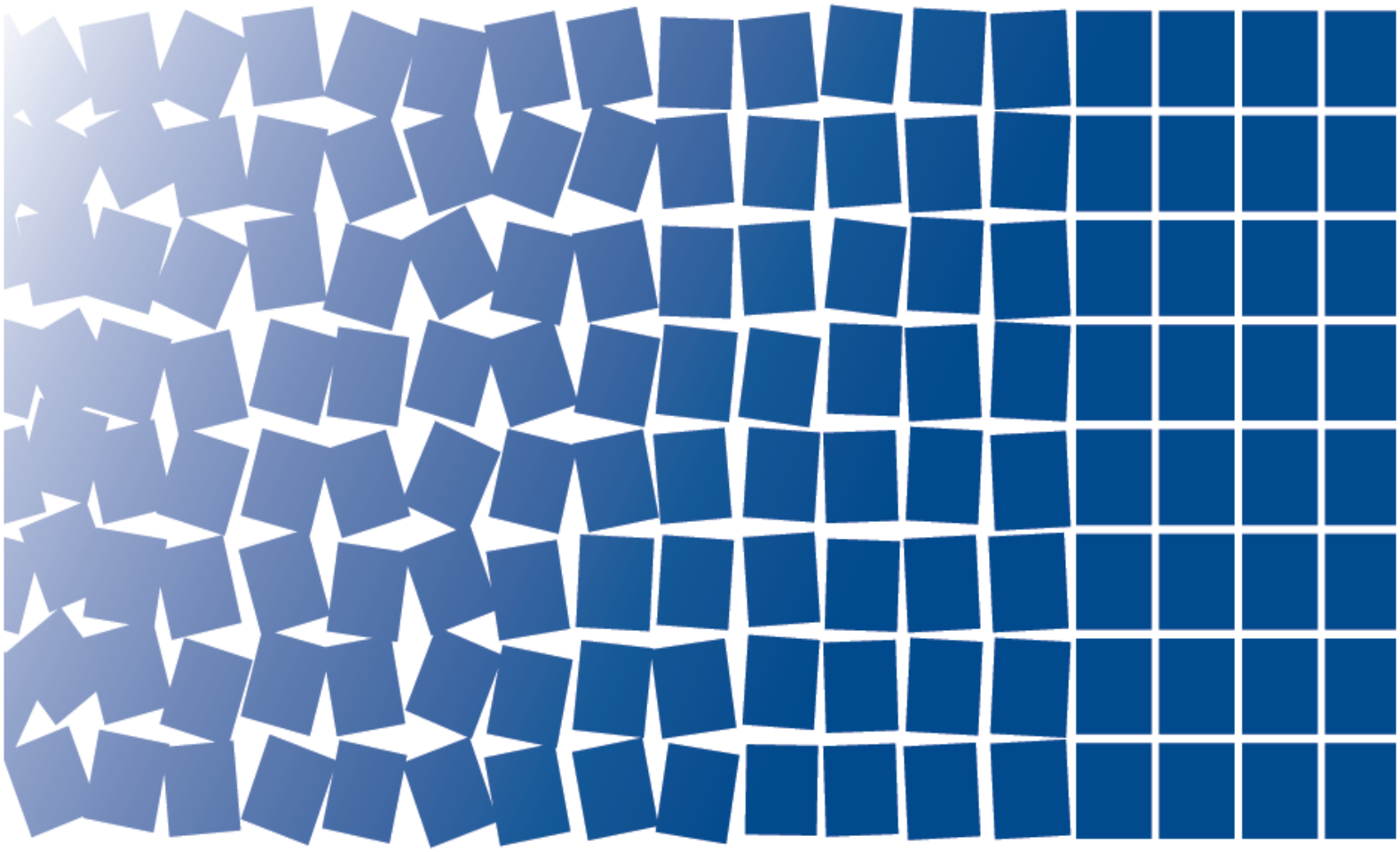
BUSINESS RISK MANAGEMENT PROGRAMS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM



BRITISH COLUMBIA

GOVERNMENT RECORDS SERVICE

BRITISH COLUMBIA Ministry of Finance

Schedule No: 147650

INFORMATION SCHEDULE APPROVAL

Title: *Business Risk Management Programs Operational Records Classification System (ORCS)*

Ministry of Agriculture
Business Development Division
Business Risk Management Branch

Scope of Schedule:

The *Business Risk Management Programs ORCS* establishes a classification system and retention and disposition schedule for records relating to developing and delivering a suite of business risk management programs, which are insurance and income protection/stabilization funded through a multi-lateral framework agreement between the provinces and the federal government of Canada, pursuant to the *Farm Income Insurance Act* (RSBC 1996, c. 130), the *Insurance for Crops Act* (RSBC 1996, c. 229), the *Continuous Crop Insurance Regulation* (BC Reg. 546/95), and the *Farm Income Protection Act* (SC 1991, c. 22). These programs help viable farming operations protect themselves from severe financial losses due to weather perils and market conditions.

The retention periods specified in this schedule meet all operational, fiscal, legal, and audit requirements.

For more information, see the attached schedule.

Earliest date of records covered by this schedule: 1967

The government body endorses this schedule and its implementation.

Email endorsement on file — November 2, 2016
Byron Jonson, A/Executive Director - Business Risk Management Programs — Date

The Information Management Advisory Committee recommends this schedule for approval.

David Curtis, Chair — May 10/17 Date

APPROVED BY THE CHIEF RECORDS OFFICER:

Cheryl Wenezenki-Yolland — May 29/17 Date

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

Schedule Developer: Sarah Jensen

Endorsed by Government Records Service.

Susan Laidlaw

~~Alex Wright, Sr. Director~~
Date Susan Laidlaw, ED
01 May 2017

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

A SA FD

BUSINESS RISK MANAGEMENT PROGRAMS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

EXECUTIVE SUMMARY

This *Operational Records Classification System (ORCS)* establishes a classification system and retention and disposition schedule for the operational records created by the Business Risk Management Branch in the Ministry of Agriculture. The program area is responsible for developing and delivering a suite of business risk management programs relating to insurance and income protection/stabilization, currently funded through the Growing Forward multi-lateral framework agreement between the provinces and the federal government of Canada, pursuant to the *Farm Income Insurance Act* (RSBC 1996, c. 130), the *Insurance for Crops Act* (RSBC 1996, c. 229), the *Continuous Crop Insurance Regulation* (BC Reg. 546/95), and the *Farm Income Protection Act (SC 1991, c. 22)*. These programs help viable farming operations protect themselves from severe financial losses due to weather perils and market conditions.

The records document insurance program development such as actuarial certification and commodity level insurance value development; program delivery such as benefits management for income protection programs and claims management for insurance, compensation, and grants programs; program and product development; and reinsurance.

The active and semi-active retention periods specified in the schedule meet all operational, administrative, legal, fiscal, and audit requirements. The final dispositions ensure that records with enduring evidential and historical values are preserved. Business risk management records will be managed in this way:

- Records classified under draft *Agriculture Fisheries and Food (AGF) ORCS* classifications and the draft *Production Insurance ORCS* will have Business Risk Management Programs (BRMP) ORCS classifications and retentions applied to them
- Onsite records classified under the approved *AGF ORCS* will be reclassified to the *BRMP ORCS*. This schedule does not apply to records that are already in off-site storage under the approved *AGF ORCS*, schedule 121300, at the time this *ORCS* is approved.

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

1) Policy-final
(secondary 61000-00) SO 5y FR

Throughout this *ORCS*, the government archives will fully retain final versions of all policies, procedures, standards and guidelines created by offices having primary responsibility for their development and approval. These records have

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significant evidential value for documenting the functions covered by this *ORCS*.

2) Reinsurance treaties (approved)
(secondary 64700-20) — SO+10y | nil | FR

Reinsurance treaties are designed so that if the program is not able to pay out its indemnities, the funds will be paid by the reinsurance companies that participated in the treaty according to the proportion they have subscribed to.

SO: when the treaty expires. This provides a sufficient period of time to ensure all outstanding claims and litigation are resolved and that the reinsurance treaty for the production year is closed.

FR: The government archives will fully retain approved reinsurance treaties, one of the core documents of the production insurance program, as they provide evidence of the financial obligation and relationship between the BC government, subscribing reinsurers, and a third party company. The treaties possess evidential, informational, and historical value.

3) Final program summary and annual reports
(secondary 61000-15) — SO | 5y | FR

These are end of program summary reports, such as Wildlife project final reports, and the branch's annual reports.

SO: when the report is approved, and no longer required for reference purposes

FR: The government archives will fully retain final program/project summary reports and branch annual reports because they document the core functions and activities of the branch. They provide a high level overview of each program/project and provide evidence of the branch's overall annual activities.

4) Insurance plan policy wording (approved)
(secondary 61100-45) — SO | nil | FR

These records document final, approved policy wording for specific commodity types such as grapes, tree fruit, and forage, clarifying contractual responsibilities for the insurer and insured.

SO: upon closure of the production insurance program

FR: The government archives will fully retain final policy wordings because they document the key functions and activities of the

	A	SA	FD
production insurance program and they provide evidence of the government's relationship with agricultural producers.			
5) Actuarial certification (secondary 61100-20)	SO	5y	SR
These records document how the program area meets the provincial requirement of the federal-provincial Growing Forward agreement to provide an actuarial certification to the Government of Canada confirming that probable yield methodologies result in yields that accurately reflect each crop's demonstrated productive capacity. This certification is required every five years or whenever a new methodology is developed or an existing methodology is revised for a crop.			
SO: upon closure of the production insurance program			
SR: The government archives will fully retain final certification reports as they provide a clear record of the products, data, and methodologies used to set coverage levels and premiums for the Production Insurance program. All other records will be destroyed.			
For physical records, box the final certification reports seperately from the rest of the file. For electronic records, contact your Records Officer for guidance on transferring the final reports to the government archives.			
6) Production Insurance operational data (secondary 61500-50)	SO	25y	DE
These are producer and insurance policy data residing in the Production Insurance system, CIRRAS, as well as reports that CIRRAS is unable to regenerate.			
SO: when data is no longer required for statistical analysis and product development purposes			
25y: The retention period conforms with accepted actuarial principles and meets regulatory requirements as stipulated in the document entitled *Canada-British Columbia Production Insurance Program - Actuarial Certification of Premium Rate Methodologies : Annual Crops (2008)* and *Perennial Crops (2009)*.			
7) Commodity level approved values and compliance testing (secondary 61100-35 and 61100-40)	SO	12y	DE
These records document the development of base commodity insurance levels through the calculation of premium rates, probable yields, insurable values; and compliance testing of probable yields and insurable values.			

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

		A	SA	FD
	SO: upon completion of the crop year. 12y: The retention period is based on the 5 year actuarial recertification requirement of the Growing Forward agreement. Two cycles of data are retained in order to perform the calculations required to demonstrate whether probable yield methodologies accurately reflect each crop's demonstrated productive capacity.			
8)	Production Insurance claims (secondary 61500-40) These records document the process of determining if the claimant is eligible for an indemnity under the Production Insurance program. SO: upon expiry of the claim's eligibility period, when claim is resolved or determined to be ineligible, and when data used to calculate claim is centrally stored in a system 12y: The retention period is based on the business requirement to access and analyze data contained in the claim in order to calculate policy coverage levels and to inform direction on program development. Coverage levels are based on a moving 10 year average loss experience. This 10 year period lags one year from the most recent/current production year. The additional year is the gap between the calendar year and the insurance crop year as defined under the individual commodity plan.	SO	12y	DE
9)	Agriculture wildlife client files (secondary 61500-42) These records document grant and compensation programs such as the wildlife damage mitigation program, wildlife forage loss compensation, and predator loss claims. These cover compensation requests initiated by producers who have experienced losses to crops or livestock resulting from wildlife damage. SO: when the participant leaves the program, or the program is replaced or cancelled, and the value of the data required for trend analysis expires 12y: The retention period is based on the business requirement to access and analyze data in order to calculate policy coverage levels and to inform direction on program development.	SO	12y	DE
10)	Western Livestock Price Insurance program (WLPIP) client files (secondary 61500-60)	SO	12y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

	A	SA	FD

These records document the delivery of insurance coverage to clients and the management of insurance claims resulting from an unexpected drop in livestock prices.

SO: when the program is replaced or cancelled; and when no longer required for reference purposes.

12y: The retention period is based on the business requirement to access and analyze data in order to calculate policy coverage levels and to inform direction on program development.

11) Production Insurance client contracts
(secondary 61500-20) — SO+6y | 6y | DE

These records document the contract between the program and the client ensuring the delivery of insurance coverage for damage to crops due to weather-related perils.

SO: upon termination of production insurance contract or if grower does not pay for coverage for 3 consecutive years

12y: The retention period is based on the business requirement to access and analyze data in order to calculate policy coverage levels and to inform direction on program development. Coverage levels are based on a moving 10 year average loss experience. This 10 year period lags one year from the most recent/current production year. The additional year is the gap between the calendar year and the insurance crop year as defined under the individual commodity plan. The retention period is also based on the completion of two audit cycles plus one additional year for each cycle.

12) Coverage analysis case files
(secondary 64700-30) — CY | 10y | DE

These records document the analysis and development of reinsurance treaties. Reinsurance treaties are designed so that if the program is not able to pay out its indemnities the funds will be paid by the reinsurance companies that participated in the treaty, according to the proportion they have subscribed to. Approved reinsurance treaties are fully retained under 64700-20.

11y: The retention period provides a sufficient period of time to ensure all outstanding claims and litigation are resolved and that the reinsurance treaty for the production year is closed.

13) Federal government approvals
(secondary 64600-20) — SO | 10y | DE

	A	SA	FD

These records document program and product submissions to the federal government, revision documents, and final government approvals.

SO: when program or product is approved by the federal government.

10y: The retention period meets the program area's reference requirements as they often consult the previous 10 years of program/product approval history records.

14) Agristability client files (secondary 61400-20) — SO — 7y — DE

These are the client files for the Agristability income protection program, which helps stabilize farm income by managing the risk of large income declines due to market conditions, production loss or increased costs of production.

SO: upon closure of the program or when paper files have been digitized and the data quality has been verified

7y: The retention period is sufficient to meet final program audit closure protocols and provides the required six year average of historic income data to calculate benefit payouts.

15) Issues management files (secondary 61000-25) — SO — 7y — DE

These records document issue management of broad or overarching BRMB issues that are not specific to a particular client.

SO: when issue is resolved or no longer required for operational purposes

7y: The retention period meets the branch's needs as issues that have not re-emerged within seven years are unlikely to do so.

16) Commodity economic values calculation (secondary 61400-25) — FY — 6y — DE

These records document data calculation of Fair Market Values (FMVs) or average prices for BC commodities, Benchmark Per Unit Margin (BPUs) or the average production margin, and Expense Margins (EMs) or expenses required to create revenue, associated with producing a particular commodity or commodity group based on industry standards.

7y: The retention period meets the program area's operational requirements of an average of six years of historic income data to calculate benefit payouts plus an additional year for reference purposes.

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	A	SA	FD
17) Product and program development / design (secondary 64600-25)	SO	nil	DE

These records document reviewing and improving existing business risk management programs such as Production Insurance and AgriStability; developing and testing new business risk management programs and products to meet the needs of farming operations; as well as summary work for pilot programs.

SO: when it has been 25 years from project completion or when deemed to not have future value. This provides an adequate period to reference the rationale, consultation, considerations and formulative thinking used in the creation of a program or product. These files may only be destroyed with director approval.

18) Records being held until the closure of the program
(secondaries 61000-20, 61100-30, 61100-50, 61300-20, 61300-30)

The closing trigger for the following records series' is upon closure of the program:

- secondary 61000-20 Federal / Provincial working group files
- secondary 61100-30 Federal actuarial approvals and recommendations
- secondary 61100-50 Insurance plan policy wording development file

The closing trigger for these records is upon the program being cancelled or replaced, all legal, fiscal and audit values have expired; and when no longer required for reference purposes, plus 5 years:

- secondary 61300-20 Client case files - other programs
- secondary 61300-30 Program administration and delivery - other programs

Agristability client case files and data, and Western Livestock Price Insurance program (WLPIP) client case files are also held until closure of the program but they are encompassed in categories 14) and 10) above because the additional retention after the program closes is 7 or more years.

19) Systems	SO	nil	DE

The Systems Section provides descriptions of electronic systems and classifications for the records residing on them. The data on the systems are described under the appropriate primary and secondary classifications.

Unless otherwise noted, each system will be destroyed when the records/data on it have been migrated to a new system performing the same function, or

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	A	SA	FD

when the relevant retention schedules have elapsed, or the information has been preserved elsewhere.

20) All Other Records DE

All other records are destroyed at the end of their semi-active retention periods. The retention of these records varies depending no the nature of the records and the function performed, but does not exceed seven years. These records have no enduring value to government at the end of their scheduled retention period. Any information from these records that has ongoing value is adequately documented under secondaries with longer retentions and/or full or selective retention appraisals within the *ORCS* or in *ARCS*, such as summary reports, policy records, and executive briefing notes (*ARCS* secondary 280-20).

END OF EXECUTIVE SUMMARY

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

BUSINESS RISK MANAGEMENT PROGRAMS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SYSTEMS SECTION

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USEFUL INFORMATION

Key to Information Schedule Codes and Acronyms:

Information Schedule titles:	***ARCS*** = *Administrative Records Classification System* ***ORCS*** = *Operational Records Classification System*
Office information:	**OPR** = Office of Primary Responsibility
Records life cycle:	**A** = Active **SA** = Semi-active **FD** = Final Disposition
Active and semi-active period codes:	**CY** = Calendar Year **FY** = Fiscal Year **NA** = Not Applicable **SO** = Superseded or Obsolete **w** = week **m** = month **y** = year
Final disposition categories:	**DE** = Destruction **FR** = Full Retention **SR** = Selective Retention **OD** = Other Disposition **NA** = Not Applicable
Special flags:	**FOI** = Freedom of Information/Protection of Privacy **PIB** = Personal Information Bank **VR** = Vital Records

The following links provide additional resources for managing your information:

- *ARCS and ORCS User Guide*.
- Special schedules for records that are not covered by *ARCS* and *ORCS*.
- Legislation, policies, and standards for managing records in the BC Government.
- Tips, guides, and FAQs on related topics.
- Records Officer contact information.

SECTION 1

BUSINESS RISK MANAGEMENT PROGRAMS

PRIMARY NUMBERS

61000 – 64799

Section 1 covers records relating to managing financial risks for agricultural producers associated with accidental crop loss and the effects of severe market volatility on crop prices. The program area is responsible for developing and delivering a suite of business risk management programs relating to insurance and income protection/stabilization, funded through agreements such as the Growing Forward multi-lateral framework agreement between the provinces and the federal government of Canada, pursuant to the *Farm Income Insurance Act* (RSBC 1996, c. 130), the *Insurance for Crops Act* (RSBC 1996, c. 229), the *Continuous Crop Insurance Regulation* (BC Reg. 546/95), and the *Farm Income Protection Act (SC 1991, c. 22)*. This includes records relating to insurance program development such as actuarial certification and commodity level insurance value development; program delivery such as benefits management for income protection programs and claims management for insurance, compensation, and grants programs; program and product development; and reinsurance.

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

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61500 PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS

64600 PROGRAM AND PRODUCT DEVELOPMENT

64700 REINSURANCE

61000 BUSINESS RISK MANAGEMENT PROGRAMS - GENERAL

Records that relate generally to insurance and income protection/stabilization programs that manage financial risks to agri-food businesses resulting from weather, wildlife damage to crops and standing feed, and market volatility. Insurance programs are based on contracts between the insurer, who promises to compensate the insured in case of loss, and the insured, who pays a premium. Income protection/stabilization programs are based on terms, conditions, and guidelines established between the program area and program participants. Compensation and grants programs operate similarly to insurance programs except there is no contractual relationship and clients do not pay premiums or enrollment fees.

Some examples of these business risk management programs are as follows:

- Production Insurance - coverage to BC farmers for weather related perils such as drought, excess moisture, hail, and freeze.
- Western Livestock Price Insurance - coverage to livestock producers providing protection against an unexpected drop in cattle and hog prices over a defined period of time.
- Agriculture Wildlife program - compensation to producers who have experienced losses resulting from damage caused by wildlife.
- AgriStability - margin based income stabilization program that protects producers from large declines in their farming income caused by production loss, increased costs or market conditions.
- AgriInvest - income assistance to producers for small income declines and the provision of support for investments to mitigate risks and improve market outcomes.

Since the majority of business risk management programs are cost-shared with the federal government, representatives from each program area participate on a federal/provincial working group to administer the program. Decisions made at this level include interpreting program rules and handling program exceptions in order to deliver the program consistently across the country.

This primary covers the development of operational policies and procedures, as well as records relating to decommissioned branch applications, federal - provincial working groups, issues management, legacy programs, and reporting.

For audits and compliance reviews, see *ARCS* primary 975.
For authorities/matrices, see *ARCS* secondary 265-20.
For federal/provincial agreements, see *ARCS* 146-25.
For final internal strategic and business plans, see *ARCS* secondary 400-10.
For reference material/topical files, see *ARCS* secondary 358-20.
For tracking spreadsheets, see *ARCS* 100-05.
For training and development files, see *ARCS* primary 1735.
For web sites, see *ARCS* 340-30.

The ministry OPR is the Business Risk Management Branch (BRMB) unless otherwise noted below. See specific secondaries for OPR retention schedules.

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61000	BUSINESS RISK MANAGEMENT PROGRAMS - GENERAL	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
-00	**Policy and procedures** (arrange by policy/procedure name) (covers final/approved versions of operational policies, procedures, standards, manuals, program and product forms, and program handbooks and guidelines pertaining to the functions and activities documented in this schedule, such as the AgriStability policy and procedures manual, program specific operational documents such as the Production Insurance operational document, the Production Insurance manual, Wildlife policy and procedures manual, and the claims procedures manual) SO: when the policy is replaced or becomes irrelevant FR: The government archives will fully retain final versions of operational policy documentation because they provide significant evidence of the governance of the functions and programs covered by this schedule. NOTE: Policy and procedure development files are classified under secondary 61000-30.	SO	5y	FR
-01	**General** NOTE: Throughout this section, this secondary covers miscellaneous records that relate to the primary but do not document decisions and actions, and do not related to topics that warrant specific classifications.	CY+1y	nil	DE
-10	**Decommissioned branch systems** (covers data in obsolete systems such as Polysys, Claims tracking system (CTS), Maximizer, Simply Accounting, and Data Repository (DREP)) SO: when no longer required for reference or operational purposes, and all legal, fiscal and audit values have expired, or when data has been migrated to a new system NOTE: This secondary covers data in decommissioned, simple applications not scheduled elsewhere in the *ORCS* (see the System Section for information on systems scheduled in this *ORCS*). The purpose of this secondary is to provide an efficient mechanism for their disposition when no longer of operational or	SO	nil	DE

61000	BUSINESS RISK MANAGEMENT PROGRAMS - GENERAL	A	SA	FD
	reference use to the branch. System overviews will not be prepared for these applications.			
-15	**Final program summary/annual reports** (arrange by report or program/project name) (covers end of program summary reports [such as Wildlife project final reports] and branch annual reports) SO: when the report is approved, and no longer required for reference purposes FR: The government archives will fully retain final program/project summary reports and branch annual reports because they document the core functions and activities of the branch. They provide a high level overview of each program/project and provide evidence of the branch's overall annual activities.	SO	5y	FR
-20	**Federal/provincial working group files** (includes agendas, minutes, correspondence, presentations, reports) (arrange by program name, then by document type) (covers records relating to administering federal-provincial cost shared business risk management programs in order to deliver the programs consistently across Canada) SO: upon closure of the program NOTE: These records may be destroyed as final decision documents and significant briefing materials are adequately documented under special schedule 102906 (*Executive Records*). Consult your Records Officer regarding approval to apply this schedule.	SO	2y	DE
-25	**Issues management files** (includes copies of briefing notes) (arrange by issue) (covers issue management of broad or overarching BRMB issues that are not specific to a particular client) SO: when issue is resolved or no longer required for operational purposes 7y: The retention period meets the branch's needs as issues that have not re-emerged within seven years are unlikely to do so. DE: These records may be destroyed because issues of	SO	7y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61000	BUSINESS RISK MANAGEMENT PROGRAMS - GENERAL	A	SA	FD
	a significant nature are adequately documented under special schedule 102906 (*Executive Records*). Consult your Records Officer regarding approval to apply this schedule. NOTE: Original briefing notes should be classified under *ARCS* 280-20. NOTE: Issues pertaining to individual grower client and appeals should be filed on the applicable case file within this schedule.			
-30	**Policy and procedure development files** (includes copies of briefing notes, correspondence, drafts, client relations documentation, program / product form development, and working materials) (arrange by policy name) SO: when the policy is approved and distributed or abandoned or when the file no longer has research or operational value DE: Policy and procedural development files may be destroyed because final policies are fully retained under secondary 61000-00.	SO	5y	DE
-35	**Promotional and communications materials** (includes reminders, notifications, brochures, handouts, and correspondence) (arrange by topic) (covers promotional/marketing program materials for growers and related communications files sent or disseminated to growers) SO: upon completion of related program year and no longer required for reference purposes NOTE: Forms are considered to be an integral part of policy; final versions of program or product forms are classified under secondary 61000-00. Draft operational forms and form development is under secondary 61000-30.	SO	3y	DE
-40	**Records of legacy programs** (covers records relating to the administration and delivery of legacy provincial funding programs and cost sharing projects and programs such as the Safety Net program, Canadian Income Stabilization program (CAIS), Net Income Stabilization	SO	nil	DE

61000	BUSINESS RISK MANAGEMENT PROGRAMS - GENERAL	A	SA	FD
	Account (NISA), and other programs closed by 2015) SO: when information is no longer required for reference purposes and all audit, fiscal, and legal values have expired NOTE: This classification is included in the *BRMP ORCS* to assist in the scheduling of records stored off-site and residual legacy program records that may be found in BRMB offices. This secondary is not for filing; its purpose is to identify the retention period for legacy projects/programs. NOTE: Data within decommissioned systems are classified under 61000-10. DE: These records may be destroyed because final project and program summary reports of legacy programs are classified and fully retained under secondary 61000-15, and approved policies and procedures are classified and fully retained under secondary 61000-00.			
-45	**Reports, statistics, and data (not covered elsewhere)** (includes reports such as routine federal and provincial reports created to meet reporting requirements of the Growing Forward agreement, performance management reports, accuracy reports, status and adhoc reports, and data used for purposes of statistical analysis) (arrange by topic) (covers reports and data spreadsheets generated by systems such as CIRRAS or used in conjunction with systems) SO: when no longer required for statistical, reporting, or research and analysis purposes NOTE: This secondary covers reports and data which are not classified elsewhere in this *ORCS*. The following reports have their own classifications: Final program summary/annual reports are under secondary 61000-15 and BARN and FARMS reports are under secondary 61400-15.	SO	5y	DE

END OF PRIMARY

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61100 INSURANCE PROGRAM RATES AND VALUES DETERMINATION

Records relating to production insurance program development and the provision of insurance coverage to agricultural producers by:

- creating, amending and maintaining insurance plan policy wordings, which are legal contracts outlining the responsibilities of the insurer and insured
- developing commodity level insurance values
- actuarially certifying the Production Insurance program

This primary covers records relating to determining the appropriate premium rates to charge in order to provide insurance coverage for potential risks. Prior to the sale of an insurance policy, various tests must be run in order to meet actuarial certification standards and to ensure that appropriate rates are set for individual production insurance plans. This process includes calculating and testing the following: probable yields, a combination of producer's past yield and the area average yield; insurable values, the value to be paid for each crop and used to calculate the premium rates and indemnity in contracts; and premium rates which are set to recover losses or claims paid over the long-term and to maintain a sustainable program.

This primary also includes records relating to the provincial requirement to provide an actuarial certification to the Government of Canada confirming that probable yield methodologies result in yields that accurately reflect each crop's demonstrated productive capacity. This certification is required every five years or whenever a new methodology is developed or an existing methodology is revised for a crop. Rates and premiums must be set using actuarially sound protocols to ensure that the insurance fund is self-sustaining. Premiums are cost shared between the Province, the federal government, and producers in accordance with existing agriculture policy framework requirements.

This primary covers developing insurance plan policy wordings and commodity level insurance values, as well as actuarially certifying the Production Insurance program.

For a description of CIRRAS, see the Systems Section.
For agreements such as the Growing Forward agreements, see *ARCS* 146-25.
For issues files, see secondary 61000-25.
For operational policy, see secondary 61000-00.
For other business risk management program development files, see primary 64600.
For reference material/topical files, see *ARCS* secondary 358-20.

The ministry OPR is Production Insurance, of the Business Risk Management Branch, unless otherwise noted below. See specific secondaries for OPR retention schedules.

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61100	INSURANCE PROGRAM RATES AND VALUES DETERMINATION	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
-01	**General**	CY+1y	nil	DE
-20	**Actuarial certification case files** (includes final certification reports, drafts, and working documents) (arrange by year, then by certification type) (covers records relating to certifying the following methodologies: premium rate, probable yield, self-sustainability, and 93 percentile evaluations) SO: upon closure of the production insurance program SR: The government archives will fully retain final certification reports as they provide a clear record of the products, data, and methodologies used to set coverage levels and premiums for the Production Insurance program. All other records will be destroyed. For physical records, box the final certification reports seperately from the rest of the file. For electronic records, contact your Records Officer for guidance on transferring the final reports to the government archives	SO	5y	SR
-30	**Federal actuarial approvals and recommendations** (includes correspondence files) (arrange alphabetically by certification type) SO: upon closure of the production insurance program	SO	5y	DE
-35	**Commodity level approved values** (includes calculator spreadsheets, associated data, and approval documentation) (arrange by year, crop plan, rate type) (covers data relating to developing base commodity insurance levels through the calculation of premium rates, probable yields, and insurable values) SO: upon completion of the crop year 12y: The retention period is based on the 5 year actuarial recertification requirement of the Growing Forward agreement. Two cycles of data are retained in order to perform the calculations required to demonstrate whether probable yield methodologies accurately reflect each crop's demonstrated productive capacity.	SO	12y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61100	INSURANCE PROGRAM RATES AND VALUES DETERMINATION	A	SA	FD
-40	**Commodity level compliance testing files** (arrange by year, crop plan, and rate type) (covers records relating to testing probable yields and insurable values) SO: upon completion of the crop year 12y: The retention period is based on the 5 year actuarial recertification requirement of the Growing Forward agreement. Two cycles of data are retained in order to perform the calculations required to demonstrate whether probable yield methodologies accurately reflect each crop's demonstrated productive capacity.	SO	12y	DE
-45	**Insurance plan policy wording - approved** (arrange alphabetically by plan name) (covers final, approved policy wording documents for specific commodity types such as grapes, tree fruit, and forage, clarifying contractual responsibilities for the insurer and insured) SO: upon closure of the production insurance program FR: The government archives will fully retain final policy wordings because they document the key functions and activities of the production insurance program and they provide evidence of the government's relationship with agricultural producers.	SO	nil	FR
-50	**Insurance plan policy wording development files** (includes drafts and working copies) (arrange alphabetically by plan name) (covers drafts and working documents relating to the development of policy wording documents) SO: upon closure of the production insurance program	SO	nil	DE

END OF PRIMARY

61300 PROGRAM DELIVERY - GENERAL

Records not shown elsewhere in this section that relate generally to delivering insurance and income protection programs to farmers. The objectives of these programs, managing financial risks to agri-food businesses, are similar but the basis of payment differs. Some programs provide insurance coverage, while others offer benefits (AgriStability and AgriInvest), compensation (Agriculture Wildlife program), grants (Wildlife Damage Mitigation program) or loans (Bred Heifer and Feeder Association Loan Guarantee). All programs may include records relating to the following activities: program enrolment, managing participant information, developing documentation outlining participant and branch responsibilities, fee payments, conducting inspections, and managing the claims/benefits and appeals processes.

This primary includes records relating to delivering and administering ad hoc and smaller business risk management programs, and client files not covered elsewhere in the *ORCS*.

For AgriStability program delivery, see primary 61400
For federal - provincial agreements, see *ARCS* 146-25.
For insurance program development records, see primary 61100.
For operational policy, see secondary 61000-00.
For production insurance, compensation, and grants programs, see primary 61500.
For program and product development records, see primary 64600.
For reference material/topical files, see *ARCS* secondary 358-20.
For the Western Livestock Price Insurance program, see primary 61500.

The ministry OPR is the Business Risk Management Branch (BRMB) unless otherwise noted below. See specific secondaries for OPR retention schedules.

61300	PROGRAM DELIVERY - GENERAL	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
	-01 General	CY+1y	nil	DE
PIB	**-05 Denied or incomplete applications for coverage** (covers denied or incomplete applications under Agristability, wildlife, and Production Insurance programs, as well as ad hoc programs within this primary) (arrange by program) SO: at the end of the coverage program year in which application is received 3y: the retention provides time for clients to complete their requests, or provide additional information that will make them eligible for coverage NOTE: Applications which are completed or approved will be	SO+3y	nil	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61300		PROGRAM DELIVERY - GENERAL	A	SA	FD
		classified under the appropriate client case files.			
PIB	**-20**	**Client case files - other programs** (includes tombstone information on program clients and related records) (arrange by program, then by client) (covers records relating to the clients of adhoc programs, such as AgriRecovery, and smaller BRMB programs not found elsewhere in the *ORCS*) SO: when the program is replaced or cancelled and all legal, fiscal and audit values have expired; and when no longer required for reference purposes NOTE: For client case files relating to Production Insurance, AgriStability, AgriInvest, and the Agriculture Wildlife program see primaries 61400 and 61500.	SO	5y	DE
	-30	**Program administration and delivery files** (includes forms, terms and conditions, field inspections, reports, correspondence, meeting materials, tracking information) (arrange by program name) (covers records relating to the administration and delivery of ad hoc business risk management programs, such as Bred Heifer and Feeder Association Loan Guarantee and AgriRecovery) SO: when the program is replaced or cancelled, and all legal, fiscal and audit values have expired; and when no longer required for reference purposes NOTE: For program delivery files relating to Production Insurance, AgriStability, AgriInvest, and the Agriculture Wildlife program see primaries 61400 and 61500.	SO	5y	DE

END OF PRIMARY

61400 PROGRAM DELIVERY - BENEFITS MANAGEMENT

Records relating to administering and managing benefits for income protection program participants resulting from a decline in net farming income due to market conditions, production loss, or increased costs of production pursuant to the *Farm Income Protection Act (SC 1991, c. 22)*. Benefit payments are made if a producer's current year margin falls more than a specified amount below the reference margin.

One of these programs is the AgriStability Program, which is administered through the BC Agriculture Risk Network (BARN), the parent name of the Client Relations Management (CRM) and Accounting applications (AX) which manage AgriStability clients relations work flows including enrolments, program eligibility, benefits approvals, and accounting operations; and FARMS (BC Farmer Access to Risk Management System), which calculates participant enrolment fees and provides staff with the ability to calculate, verify, and adjust AgriStability benefits. These applications have been synchronized to share relevant data on participants.

This primary also includes records relating to appeals and adjustment requests, as well as records relating to the AgrInvest program which helps farmers manage small income declines and provides support for investments to mitigate risk or improve market outcomes.

For authorizations/matrices, see *ARCS* secondary 265-20.
For data extracts received from the Canada Revenue Agency (CRA), see special schedule 102902 (*Transitory Electronic Data Processing* (EDP)).
For data sharing agreements, see *ARCS* primary 146.
For a description of AgriStability systems (BARN CRM/AX and FARMS), see the Systems Section.
For federal - provincial agreements, see *ARCS* 146-25.
For final program reports, see 61000-15.
For issues, see secondary 61000-25.
For operational policy, see secondary 61000-00.
For reference material/topical files, see *ARCS* secondary 358-20.
For training materials, see *ARCS* primary 1735.

The ministry OPR is AgriStability, of the Business Risk Management Branch, unless otherwise noted below. See specific secondaries for OPR retention schedules.

61400	PROGRAM DELIVERY - BENEFITS MANAGEMENT	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
	-01 General	CY+1y	nil	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61400		PROGRAM DELIVERY - BENEFITS MANAGEMENT	A	SA	FD
	-10	**BARN articles** (includes published and unpublished articles, speaking notes developed to address repeated client inquiries, and technical information residing in the BARN library) (arrange by topic) (covers records residing in BARN related to assisting staff navigate complex program rules and for purposes of communicating program information, such as updates, to the public) SO: when information had been updated or no longer has operational value	SO	nil	DE
	-15	**BARN and FARMS reports** (includes internal and external status output reports and analytical reports) (arrange by report type) (covers reports relating to program performance across various parameters and participant data extracts used to generate internal reports for commodity analysis and calculation purposes) SO: when report is sent to Agriculture Canada, has been reviewed and disseminated internally, and is no longer required for reference purposes NOTE: The AgriStability and AgriInvest Forecasting Model (AAFM) data extract sent from FARMS to Agriculture Canada for program forecasting purposes is retained on the shared drive until its quality has been verified by the federal government. This data extract may be destroyed under special schedule 102902 (*Transitory Electronic Data Processing* (EDP)).	SO	5y	DE
PIB	**-20**	**AgriStability client case files and data** (includes enrollment documentation, new participant package (NPP), job comments, correspondence, benefit calculation documents, appeal submission form, commodity productive capacity forms, Statement A Harmonized AgriStability and AgriInvest Programs Information and Statement of Farming Activities for Individuals and Corporations, estate documentation, AgriStability and AgriInvest Programs Additional Information and Adjustment Request (T1275) form, Cancel Participation form, Calculation of Benefit (COB), supporting documentation provided by producer, interim application, and advance payment documentation) (arrange by Personal Identification Number (PIN), then by program year)	SO	7y	DE

61400	**PROGRAM DELIVERY - BENEFITS MANAGEMENT**	**A**	**SA**	**FD**
	(covers documentation residing in the BARN DOCUMENTS folder, hard copy participant files in the Kelowna field office and Abbotsford, and data residing in BARN CRM/AX (participant data, enrolment/enrolment history records, benefit/benefit history records, enrolment fees and benefit amounts, and financial data) and FARMS (CRA data, final FMV, BPU, and EM values, enrolment fees, and COBs)) OPR: Business Risk Management Branch Head office, Kelowna; Kelowna and Abbotsford regional offices SO: upon closure of the program or when paper files have been digitized and the data quality has been verified 7y: The retention period is sufficient to meet final program audit closure protocols and provides the required six year average of historic income data to calculate benefit payouts. NOTE: Records that have been inputted can be deleted under special schedule 102902 (*Transitory Electronic Data Processing (EDP) Records*). Paper records that have been scanned and verified are covered under special schedule 206175 (*Redundant Source Records*). Consult your Records Officer regarding approval to apply these schedules. NOTE: Hard copy files from 2009 to 2012 reside in the Kelowna offices and Abbotsford regional offices. These files may be destroyed once they have been digitized. The retention period will then apply to digitized records and data in the AgriStability systems.			
-25	**Commodity economic values calculation** (includes data calculation spreadsheets and associated data) (arrange by commodity type (Horticulture or Livestock), then by year, and by BPU or FMV) (covers data required to calculate Fair Market Values (FMVs) or average prices for BC commodities, Benchmark Per Unit Margin (BPUs) or the average production margin, and Expense Margins (EMs) or expenses required to create revenue, associated with producing a particular commodity or commodity group based on industry standards) 7y: The retention period meets the program area's operational requirements of an average of six years of historic income data to calculate benefit payouts plus an additional year for reference purposes.	FY	6y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61400	**PROGRAM DELIVERY - BENEFITS MANAGEMENT**	**A**	**SA**	**FD**

NOTE: Final FMV, BPU, and EM values are manually entered into FARMS. Verification staff use these values for benefit calculations.

END OF PRIMARY

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61500 PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS

Records relating to the delivery of insurance coverage to clients and the management of insurance claims resulting from suspected damage to crops due to weather-related perils or an unexpected drop in livestock prices, through programs such as the Production Insurance program and the Western Livestock Price Insurance program.

The Production Insurance program, pursuant to the *Farm Income Insurance Act* (RSBC 1996, c. 130) and the *Insurance for Crops Act* (RSBC 1996, c. 229), is supported by the application CIRRAS, which creates and manages grower insurance policy details including coverage, premiums, and payments. It also supports program enrolment, application processing, underwriting, claims tracking, inspections, adjustments, appeals, and payment. The insurance claims process commences when the branch receives the insured's Notice of Loss (NOL). The claims adjudication process involves evaluation, confirmation, substantiation and quantification of the loss by the insurer. The claims process is complete when both parties accept a financial settlement or settlement is determined by binding arbitration.

This primary also covers records relating to compensation requests initiated by producers who have experienced losses to crops or livestock resulting from wildlife damage. The Agriculture Wildlife program (AWP) and its components such as predator compensation, damage to standing forage, and damage to standing grain are compensation programs, which differ from insurance programs in that clients do not pay premiums or enrollment fees. Eligible participants must furnish proof of BC Assessment Farm Status and private land ownership and/or lease confirmation along with a tax reporting number for any potential payments.

For authorizations/matrices, see *ARCS* secondary 265-20.
For a description of CIRRAS, see the Systems Section.
For federal - provincial agreements, see *ARCS* 146-25.
For final program reports, see secondary 61000-15.
For issues, see secondary 61000-25.
For operational policy, e.g. the Production Insurance manual, see secondary 61000-00.
For reference material/topical files, see *ARCS* secondary 358-20.
For training materials, see *ARCS* primary 1735..

The ministry OPR is Production Insurance, of the Business Risk Management Branch, unless otherwise noted below. See specific secondaries for OPR retention schedules.

61500	PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
	-01 General	CY+1y	nil	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61500		PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS	A	SA	FD
	-10	**Schedule A originals - compilation file** (arrange by plan, then by client surname) (covers the collection of Schedule A's which have the original signature on them, and are used to confirm vested interest; Schedule A's are application forms for Production Insurance) SO: upon termination of production insurance contract or if grower does not pay for coverage for 3 consecutive years	SO	nil	DE
PIB	**-20**	**Production Insurance client contract case files** (includes correspondence, producer tombstone information, copy of Schedule A application, land inventory, assessment roll report, lease agreement (if applicable), maps, Declaration of Production (Schedule D), seed crop reports, underwriting sheets, risk assessments, Statement of Premiums and Coverage (SPC), claims information such as calculation sheets and inspection reports) (arrange by policy/contract number, then grower's name) (covers contract files in the custody of field offices, yearly policy files, and related claims information) SO: upon termination of production insurance contract or if grower does not pay for coverage for 3 consecutive years 12y: The retention period is based on the business requirement to access and analyze data in order to calculate policy coverage levels and to inform direction on program development. Coverage levels are based on a moving 10 year average loss experience. This 10 year period lags one year from the most recent/current production year. The additional year is the gap between the calendar year and the insurance crop year as defined under the individual commodity plan. The retention period is also based on the completion of two audit cycles plus one additional year for each cycle. NOTE: Production insurance contracts are continuous. A client/entity may choose not to be insured during a particular production year(s) but this does not constitute termination of the contract. Termination may occur only through a written termination request or if insured does not renew for three consecutive years.	SO+6y	6y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61500	**PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS**		**A**	**SA**	**FD**
		NOTE: Records that have been input to the Production Insurance digital system, CIRRAS, can be deleted under special schedule 102902 (*Transitory Electronic Data Processing (EDP) Records*). Paper records that have been scanned and verified are covered under special schedule 206175 (*Redundant Source Records*). Consult your Records Officer regarding approval to apply these schedules NOTE: From 2015 onwards, the portion of the client contract case file pertaining to claims is scanned into CIRRAS. The hard copy file is sent from the field offices to the Business Risk Management Branch head office, Kelowna. NOTE: Data used to calculate coverage levels and claims, as well as production and loss records must be captured electronically before the hard copy files may be destroyed.			
PIB	**-22**	**Production Insurance appeal case files** (includes correspondence, research materials, memoranda, reports, notifications, copies of the appeal deposit, and other arbitration documentation such as arbitrator's decision and appeal outcome letter) (arrange alphabetically by client name, appeal, policy number, and year) SO: when the arbitrator makes a decision or it is determined that the appeal does not comply with policy wording requirements NOTE: These records may be destroyed as they are not required to inform underwriting and future program development.	SO	5y	DE
	-36	**Production Insurance claims calculator and supporting applications data** (includes the claims calculator tool, populated with policy level information and coverage details, underwriting scale sheets, containing production data used to determine crop values, and other data and tools used to support the Production Insurance program) (arrange by year and topic) SO: when the quality of the data integrated into CIRRAS or another system is verified or data no longer has operational value	SO	5y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61500	PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS	A	SA	FD
-40	**Production Insurance claims case files** (includes claim summary, calculation sheets and inspection reports, claim letter or zero claim letter) (arrange by policy number, a unique claim number generated by CIRRAS, and year) (covers records relating to the process of determining if the claimant is eligible for an indemnity under the Production Insurance program) SO: upon expiry of the claim's eligibility period, when claim is resolved or determined to be ineligible, and when data used to calculate claim is centrally stored in a system 12y: The retention period is based on the business requirement to access and analyze data contained in the claim in order to calculate policy coverage levels and to inform direction on program development. Coverage levels are based on a moving 10 year average loss experience. This 10 year period lags one year from the most recent/current production year. The additional year is the gap between the calendar year and the insurance crop year as defined under the individual commodity plan.	SO	12y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61500	PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS	A	SA	FD
-42	**Agriculture wildlife client files** (includes applicant information, Notice of Loss, compensation request form, inspection report, verification file, photos, calculator spreadsheets, assessment survey, maps, summary information of payment details, valuation of animal report, correspondence, and other related records) (arrange by program, then by AWP number or pilot project name or by Conservation Officer (COV) number) (covers records relating to grant and compensation programs such as wildlife damage mitigation program client case files, wildlife forage loss compensation case files, and predator loss claims case files) SO: when the participant leaves the program, or the program is replaced or cancelled, and the value of the data required for trend analysis expires 12y: The retention period is based on the business requirement to access and analyze data in order to calculate policy coverage levels and to inform direction on program development. Coverage levels are based on a moving 10 year average loss experience. This 10 year period lags one year from the most recent/current production year. The additional year is the gap between the calendar year and the insurance crop year as defined under the individual commodity plan.	SO	12y	DE
-50	**Production Insurance operational data** (arrange by policy number) (covers producer and insurance policy data residing in the Production Insurance system, CIRRAS, as well as reports that CIRRAS is unable to regenerate) SO: when data is no longer required for statistical analysis and product development purposes 25y: The retention period conforms with accepted actuarial principles and meets regulatory requirements as stipulated in the document entitled *Canada-British Columbia Production Insurance Program - Actuarial Certification of Premium Rate Methodologies : Annual Crops (2008) and Perennial Crops (2009).*	SO	25y	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

61500		PROGRAM DELIVERY - INSURANCE, COMPENSATION, AND GRANTS PROGRAMS	A	SA	FD
PIB	**-60**	**Western Livestock Price Insurance program (WLPIP) client case files** (arrange by client name) SO: when the program is replaced or cancelled; and when no longer required for reference purposes 12y: The retention period is based on the business requirement to access and analyze data in order to calculate policy coverage levels and to inform direction on program development. Coverage levels are based on a moving 10 year average loss experience. This 10 year period lags one year from the most recent/current production year. The additional year is the gap between the calendar year and the insurance crop year as defined under the individual commodity plan.	SO	12y	DE

END OF PRIMARY

64600 PROGRAM AND PRODUCT DEVELOPMENT

Records relating to reviewing and improving existing business risk management programs such as Production Insurance and AgriStability and developing new business risk management programs and products to meet the needs of farming operations. For existing programs, this pertains mainly to Production Insurance where the Province has the flexibility to adapt program design to meet provincial policy objectives. The program area consults extensively with key stakeholders such as industry groups and the federal and provincial governments on the design and performance of business risk management products, and sponsors and manages research and development projects in order to introduce or improve programs/approaches, products and services.

This primary also contains records relating to the assessment and development of AgriRecovery, an ad hoc federal-provincial-territorial (FTP) disaster relief framework designed to help agricultural producers recover from natural disasters or unexpected events such as the avian flu; and AgriRisk Initiatives which encourage partnerships between governments, industry, stakeholders, and the private sector to proactively develop and deliver new risk management products and services (tools).

This primary covers federal government approval submission packages, product development/design case files, and program stakeholders and advisory groups meeting materials. Once stakeholder approval is achieved, the program/product is handed to operations staff for delivery to growers.

For agreements, see *ARCS* secondary 146-25
For executive briefing notes, see *ARCS* 280-20.
For issues not covered in this primary, see secondary 61000-25.
For policy and procedures, see secondary 61000-00.
For policy from external sources, see *ARCS* primary 195.
For program delivery, see primaries 61300, 61400, and 61500.
For reference material/topical files, see *ARCS* secondary 358-20.
For travel authorization, see *ARCS* primary 1240.

The ministry OPR is Policy and Product Review, of the Business Risk Management Branch, unless otherwise noted below. See specific secondaries for OPR retention schedules.

64600	PROGRAM AND PRODUCT DEVELOPMENT	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
	-01 General	CY+1y	nil	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

64600	PROGRAM AND PRODUCT DEVELOPMENT	A	SA	FD
-20	**Federal government approvals** (includes correspondence and official submission packages) (arrange by program/product) (covers records relating to program/product submissions to the federal government, revision documents, and final government approvals) SO: when program/product is approved by the federal government 10y: The retention period meets the program area's reference requirements as they often consult the previous 10 years of program/product approval history records.	SO	10y	DE
-25	**Product and program development/design files** (includes notes, correspondence, rationale, option evaluations, assessments, consultation documents, discussion papers, performance evaluations, reports and data compiled from numerous sources including existing program experience data and project specific subsets, research materials, methodologies, implementation plans, photographs, data extracts, and issues papers) (arrange by product, then commodity) (covers records relating to developing and testing new or existing programs, products, or ventures, as well as summary work for pilot programs) OPR: Business Risk Management Branch (BRMB) SO: when it has been 25 years from project completion or when deemed to not have future value NOTE: The retention provides an adequate period to reference the rationale, consultation, considerations and formulative thinking used in the creation of a program or product. NOTE: These files may only be destroyed with director approval.	SO	nil	DE

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

64600		PROGRAM AND PRODUCT DEVELOPMENT	A	SA	FD
PIB	**-35**	**Program stakeholders and advisory groups** (includes correspondence, agendas, minutes, terms of reference, presentations) (arrange alphabetically by name of stakeholder or advisory group) (covers records relating to consultations with provincial stakeholders and advisory groups, such as BC commodity organizations, and corresponding business risk management program/product improvement/development) SO: when information is no longer relevant to support business risk management products DE: These records may be destroyed as final decision documents and significant briefing materials are adequately documented under special schedule 102906 (*Executive Records*). NOTE: National working group files, such as the AgriInsurance working group and the Business Risk Management working group, are classified under secondary 61000-25.	SO	5y	DE

END OF PRIMARY

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

64700 REINSURANCE

Records relating to the development, brokering, and analysis of reinsurance. To protect both the Province and its clients, the Production Insurance program signs a reinsurance treaty. The treaty is designed so that if the program is not able to pay out its indemnities, the funds will be paid by the reinsurance companies that participated in the treaty according to the proportion they have subscribed to.

The treaty development process is facilitated by a third party company that is also responsible for marketing the treaty to reinsurance providers.

This primary includes reports, correspondence, and memoranda.

For operational policy, see secondary 61000-00.
For payment reinsurance premiums, see *ARCS* 1130-20.
For receipt of reinsurance indemnities, see *ARCS* 1095-20.
For reference material/topical files, see *ARCS* secondary 358-20.

The ministry OPR is Business Operations, of the Business Risk Management Branch, unless otherwise noted below. See specific secondaries for OPR retention schedules.

64700	REINSURANCE	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
-01	**General**	CY+1y	nil	DE
-20	**Approved reinsurance treaties** (arrange by program year) SO: when the treaty expires 10y: The retention period provides a sufficient period of time to ensure all outstanding claims and litigation are resolved and that the reinsurance treaty for the production year is closed. FR: The government archives will fully retain approved reinsurance treaties, one of the core documents of the production insurance program, as they provide evidence of the financial obligation and relationship between the BC government, subscribing reinsurers, and a third party company. The treaties possess evidential, informational, and historical value.	SO+10y	nil	FR

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

64700	REINSURANCE	A	SA	FD
-30	**Coverage analysis case files** (includes correspondence, memos, treaty summaries, schedule of exclusions, worksheets, reports, copies of signed reinsurance treaties, working documents, and invoices from reinsurers) (arrange by program year) (covers records relating to the development of the reinsurance treaty) 11y: The retention period provides a sufficient period of time to ensure all outstanding claims and litigation are resolved and that the reinsurance treaty for the production year is closed.	CY	10y	DE

END OF PRIMARY

BUSINESS RISK MANAGEMENT PROGRAMS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (*ORCS*)

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This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

SYSTEM SECTION: COMMON SYSTEM NOTES

Retention Schedules for the Systems

The data on the systems is classified under appropriate secondaries in the *ORCS* and in *Administrative Records Classification System* (*ARCS*), as indicated in the following descriptions. The systems themselves are all scheduled as follows:

Active	SO:	The system becomes superseded and obsolete when all data has been migrated to another system or documented elsewhere, or when all applicable retention schedules for the data have expired; see relevant classifications.
Semi-Active	nil:	There is no semi-active retention period assigned to systems.
Final Disposition	DE:	Each system will be destroyed when all data has been migrated to another system performing the same function, schedules covering the data have elapsed, or the data has been preserved elsewhere. For data retention details, see the applicable system overview.

AGRISTABILITY SYSTEMS

SYSTEM OVERVIEW

Creating Agency
Ministry of Agriculture

Business Risk Management Branch (BRMB)

Purpose
The AgriStability program is administered through two systems: the BC Agriculture Risk Network (BARN), the parent name of the Client Relations Management (CRM) and Accounting applications (AX) which manage AgriStability clients relations work flows including enrolments, program eligibility, benefits approvals, and accounting operations; and FARMS (BC Farmer Access to Risk Management System), which calculates participant enrolment fees and provides staff with the ability to calculate, verify, and adjust AgriStability benefits.

BARN CRM is a customized version of Microsoft Dynamics CRM; BARN AX, is an accounting solution (CITRIX application); and FARMS is a customized application. These applications have been synchronized to share relevant data on participants. BARN CRM and AX communicate with each other. FARMS communicates unidirectionally to BARN.

Information Content
BARN contains participant records (name, participant type, postal code, regional office, municipality, SIN or Business Number), client contact notes, enrolment records, enrolment history records, benefit records, benefit history records, and financial details records. Viewing the enrolment and benefit/benefit approval records for a specific Personal Identification Number (PIN) for any given year can be obtained directly from the participant record. BARN also tracks the approvals of different expense authorities (EAs), client appeals and adjustment requests, and contains a library of articles and speaking notes developed to respond to repeated client inquiries and to deliver program updates.

Documents associated with each record type in BARN can be retrieved through the Associated Documents link to the BARN document repository which resides on the shared drive folder BARN_Documents\AgriStability (arranged by PIN, program year).

The AX component of BARN records payment of enrolment fees by producers and processes AgriStability payments to producers. As financial details are created/updated in AX, they are synchronized to CRM.

FARMS contains Canada Revenue Agency (CRA) income tax data on all participants; final Fair Market Values (FMVs), Benchmark Per Unit Margins (BPUs), and Expense Margins (EM) values; and individual Calculation of Benefits (COB) or the details of the determination of how much financial compensation a participant will receive.

Inputs, Processes, and Outputs
Inputs to BARN CRM include:

- Manually input participant/new participant information, interims, adjustments (form T1275), and appeals using CASE template (log template)

- Data sent from FARMS update applicable records (enrolment fees and benefit calculations amounts)
- When processing enrolment payments received from participants or benefit payments to participants, staff select from open line items to include either enrolment deposit batch or cheque requisition for benefit payments

Inputs to BARN AX include:

- When benefit or enrolment records are created in BARN CRM, data is automatically sent to BARN AX which update applicable participant accounts with enrolment fee and benefit calculation line entries

Inputs to FARMS include:

- Weekly Canada Revenue Agency (CRA) data imports
- Manually input participant tombstone data, tax information, income and expenses, and productive capacity
- Supplementary data submissions (if not included in CRA data import)

Processes:

Program participants provide current tax and program information on the harmonized (T1273 tax plus program) form to the CRA in Winnipeg. This includes Statement A (income and expense data) and supplementary forms (accrual and productive capacity data). The CRA sends this information to Agriculture and AgriFood Canada in Winnipeg who transfer the data to the BC Ministry of Agriculture BRMB head office, Kelowna. The T1273 data is sent electronically via a secure FTP portal. This data, in CSV format, is saved to the program area shared drive and is imported into FARMS for benefit calculations. Hard copy Statement A documentation is sent by fax and mail to BRMB head office, Kelowna and documents are transferred to BARN documents.

Record creation, navigation, and management - Staff manually create and maintain new and existing participant records. When BARN receives participant enrolment fees calculated by FARMS, the system ensures an enrolment record exists for the participant and program year. For existing participants, enrolment records are generated as part of an automatic work flow; for new participants, they are manually created. Staff also manually create enrolment history records for new participants where there are no reference year margins from previous years to draw upon.

Enrolment - The yearly enrolment process may be done in bulk or on an individual basis. Staff consult the previous year's participant list in BARN in order to identify candidates for the upcoming program year. Automatic work flows take the previous year's participant list and create blank enrolment records. Work flows in FARMS calculate the enrolment fees based on the data in FARMS, sending the final calculations to enrolment records in BARN. The associated enrolment record is updated to “enrolment fees calculated” or remains at “not enough information.” When BARN receives the enrolment fees and the enrolment record is "enrolment fees calculated", using Microsoft mail merge staff create the enrolment notice, printing and sending a hard copy enrolment notice to participants.

At this point, open line items such as enrolment and administrative cost sharing (ACS) fees waiting for payment are populated in AX. When the participant pays the fees, regional clerks enter payment data in AX, marking items off as received. The enrolment record in BARN then updates to enrolled.

Once BARN has been notified that the enrolment fee has been paid, the benefit record is created in BARN where it remains until tax and supplementary information is received from the program participant.

Benefit calculations - When submission of tax and supplementary information and payment of the enrolment fee is confirmed, the benefit record in BARN is flagged as ready for processing. The verifier enters FARMS to check out the file, which should contain most of the information required to calculate the benefit. If information is missing, the verifier contacts the program participant or his/her accountant and enters this information into FARMS. The verifier then calculates the benefit based on algorithms and business rules programmed in FARMS. When this process is complete, the verifier sets the file scenario in FARMS to verified, commencing the approval work flow in BARN CRM.

Benefit approvals - A benefit is ready for approval when a file scenario in FARMS had been marked as verified. BARN manages the approval work flow and creates the necessary benefit approval records. A work flow will create a benefit approval record for each required level of approval as specified by the branch's approval matrix and assigns the record to the appropriate queue for processing. Work flows update the benefit record in CRM with status changes based on the financial details of the benefit synchronized from AX. If the approver requests an adjustment or review, the benefit calculations process starts again.

Claims administration - When the benefit record is completed and the approvals are done, the file is sent to the Claims Administrator queue. For those benefits with a dollar value, the claims administrator creates a cheque requisition for expense authority (EA) approval in BARN AX. The claims administrator then prepares a package for the participant consisting of the benefit notification letter/statement of account letter, Calculation of Benefits (COB), and related documents. A copy of the COB, statement of account, and cheque requisition are sent to the Ministry of Finance in Victoria for cheque issuance. Front office staff prepare and send a package consisting of a $0.00 benefit notification/statement of account letter, Calculation of Benefits (COB) and related documents to participants who receive no financial compensation

AX performs the following accounting operations: financial reporting, AX fund 1 tracking, deposit processing and deposit slip printing, payment processing, cheque requisition printing, and financial corrections.

When a producer calls about specific file information, staff must verify their identity prior to releasing program details. Incoming phone calls may be logged by entering a note in the participant record.

Outputs:

Outputs from BARN CRM include the annual AGRI 1 form sent to all participants who receive a dollar benefit value, data required to create statement of account letters for participants using Microsoft mail merge operational reports such as status reports, scheduled monthly/quarterly reports, adhoc reports which can be generated by specific criteria or to identify trends and provide benchmarking, and financial reports such as participant enrolments for the year, benefits paid out, and number of participants who did not pay enrolment fees.

Outputs from BARN AX include cheque requisitions and deposits (DDTD), deposit/payment data, and other financial reports.

Outputs from FARMS include enrolment fees and benefit amounts sent to BARN, the Calculation of Benefits (COB), and extracts and reports for various federal and provincial stakeholders.

The AgriStability and AgriInvest Forecasting Model (AAFM) data extract sent from FARMS to Agriculture Canada for program forecasting purposes is retained on the shared drive until its quality has been verified by the federal government.

Historical Note
Maximizer was a commercial CRM solution used by the Ministry to manage participant information. Maximizer was replaced by Microsoft Dynamics CRM, a more scalable and robust enterprise CRM solution. Data from Maximizer was extracted and imported into Microsoft Dynamics CRM.

Simply Accounting was a commercial small business accounting solution used by the Ministry to record participant fund 1 balances. It was replaced by Microsoft AX. Data from Simply Accounting Ledgers was extracted and imported into Microsoft AX.

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

AGRISTABILITY SYSTEMS

Classification of Records that Relate to the System

Schedule Code	Secondary No.	Secondary Title	Retention Schedule A	SA	FD
Data in the System					
BRMP	61400-20	AgriStability client case files and data	SO	7y	DE
BRMP	61400-10	BARN articles	SO	nil	DE
Inputs					
BRMP	61400-20	AgriStability client case files and data	SO	7y	DE
BRMP	61400-25	Commodity economic values calculation	FY	6y	DE
102902		Transitory Electronic Data Processing (EDP) Records (covers Canada Revenue Agency (CRA) data extracts)	SO	nil	DE
Outputs					
BRMP	61400-20	AgriStability client case files and data	SO	7y	DE
BRMP	61400-15	BARN and FARMS reports	SO	5y	DE
Other Related Records					
ARCS	6820-05	Back-up data	SO	nil	DE
ARCS Section 6	see appropriate secondaries	INFORMATION TECHNOLOGY			
102902		Transitory Electronic Data Processing (EDP) Records	SO	nil	DE

Schedule Code Key: *ARCS* = *Administrative Records Classification System*, schedule 100000.
BRMP = *Business Risk Management Programs*, schedule 147650.

END OF OVERVIEW

CROP INSURANCE RISK AND REPORTING ADMINISTRATION SYSTEM (CIRRAS)

SYSTEM OVERVIEW

Creating Agency
Ministry of Agriculture

Business Risk Management Branch (BRMB)

Purpose
CIRRAS is the policy management system that supports the Production Insurance program offered to farmers in BC. It creates and manages grower insurance policy details including coverage, premiums, and payments. It facilitates producer application processing and includes modules on growers, contacts, policies, claims, and inspections.

The system, designed as a web application that runs on top of an Oracle database containing current and historical crop insurance data, was constructed by CGI Information Systems and Management Consultants Inc. using Microsoft's .NET framework and Oracle 9i. Currently it is managed by Vivid Solutions Inc.

The system is a hybrid of uploaded digital records and manually input and scanned hard copy files.

Information Content
CIRRAS contains production insurance policy information such as policy number, grower number, grower legal name, plan name, crop type, policy status, and product purchase status.

Farm production is organized into insurable crop units/farm lot/variety. Farm lot records are children of insurable crop units and commodity sub variety records are children of farm lots.

CIRRAS also contains underwriting data (contract number, crop type, number of acres, number of plants, probable yield per unit, individualized insurable value, grower price index, individual surcharge discounts, insurable value modifier) and financial data (premium rates, minimum premium parameters, premium cost shares, insurable values, adjusting fees, annual plan fee, qualified insurance areas, and governing and subordinate commodity relationships).

Inputs, Processes, and Outputs
Inputs: Staff manually input information on new growers, referred to as producers, into CIRRAS. They also search for data on existing growers, verifying name, address, tax number, and vendor number.

CIRRAS also has utilities to upload data sets of underwriting and financial parameters used to determine coverage and premiums in generation of batch policies. 10 to 15 years of grower farm production data is required to determine coverage and premiums according to an actuarial certified methodology. Some key inputs into CIRRAS are derived by spreadsheet applications. One of these, the claims calculator, calculates the claim amount that is then manually entered into CIRRAS.

Processes:

Underwriting/rollover - Underwriting is currently done outside CIRRAS using Excel spreadsheets – each plan type has its own set of excel sheets which point to specific data files (i.e. Scalecalc for Tree

Fruits, ForData for Forage, etc.). The underwriting process sets the Probable Yield (PY). Growers receive a 6 digit Grower Number which is the identifier of the grower and a 6 digit contract number. The policy number is the contract number plus the last two digits denoting the year that the contract is in place for (i.e. 123456-15). All current policies are underwritten in time to make an offer one month before the start of the next growing season.

Once the underwriting is complete/reviewed and approved it is loaded into CIRRAS along with the premium rates and insurable values. The system looks for existing contract numbers that are an exact match to the data in the upload file. The system also attempts to match and load the following data: plan type, grower legal name, grower number, and commodity type. When a match is found, the PY for that match is loaded. Insurance area, office, and agent name are all fields that are rolled forward each year as part of the tombstone data associated with a given contract number.

If no match is found through the upload process, the agent must enter the data into CIRRAS manually starting with creating a grower number (assuming a brand new grower) or doing a search in CIRRAS to find an existing grower who did not have an active policy. In this later case, CIRRAS locates the contract number(s) associated with the grower and asks the agent if they would like to use the associated contract number or create a new number. The agent decides which number to use, then adds the product purchase(s) in order to create an offer of insurance. Once the necessary data (PY, number of units) have been entered into CIRRAS, the system calculates the premiums, and an offer is generated. All offers are set at minimum (50% deductible) coverage and an options sheet showing the other deductible levels available for purchase is sent to the grower. Once the grower makes the selection(s) a finalized policy is generated. The agent updates CIRRAS with the coverage options selected and CIRRAS re-calculates the new premiums owed. Once the sale is completed and paid for, the agent sets the policy status to active.

Claims processing - CIRRAS tracks the entire claims process. The growers submits the Notice of Loss (NOL) in hard copy or over the phone. Regional support clerks enter the NOL into CIRRAS which generates a receipt of the NOL that is sent to the grower. The claims monitor assigns the NOL to an adjustor who performs their inspection remitting their completed forms and reports. Previously, the grower submitted a Declaration of Production (sometimes used in claims calculation and underwriting in CIRRAS). The claims monitor recommends the claim both in hard copy and in CIRRAS. The regional office scans a copy of the claim into CIRRAS. The hard copy is sent to branch headquarters, Kelowna. The claims manager or delegate approves the hard copy of a claim, also approving it in CIRRAS. The hard copy is sent to the claims administrator.

Claims payment processing - The claims administrator checks the vendor and tax number in CIRRAS, comparing the vendor number to the Corporate Accounting System (CAS), confirms the policy in CIRRAS is active, determines if moneys are owing, and confirms approval of the claim and the correct dollar amount. The claims administrator then creates a cheque requisition in CIRRAS which generates a PDF that is uploaded and adjusted as required. This document is printed and sent to the expense authority (EA). Once approved, the cheque requisition field in CIRRAS is updated from draft to final, generating letters to growers (PDF copies are sent electronically to regional offices, originals to growers, and paper copies are attached to the claim and filed in the claim files). The cheque requisition is scanned, saved on the branch drive, and sent to the Ministry of Finance in Victoria. Hard copy cheque requisitions are given to the program accountant. The client has 30 days from receipt of the letter to appeal the payment decision.

Outputs: In CIRRAS, all reports are generated as Adobe PDF files. Reports include: Statement of Premiums and Coverage, claims letter, contract history, grower fact sheet, mailing labels, status reports (by plan, office, and crop year), and adhoc reports.

Historical Note
CIRRAS replaced Polysys.

CIRRAS

Classification of Records that Relate to the System

Schedule Code	Secondary No.	Secondary Title	Retention Schedule A	SA	FD
Data in the System					
BRMP	61500-50	Production Insurance operational data	SO	25y	DE
Inputs					
BRMP	61500-20	Production Insurance client contract case files	SO+6y	6y	DE
BRMP	61500-36	Production Insurance claims calculator and supporting applications data	SO	5y	DE
Outputs					
BRMP	61000-40	Records of legacy programs	SO	nil	DE
Other Related Records					
ARCS	6820-05	Back-up data	SO	nil	DE
ARCS Section 6	see appropriate secondaries	INFORMATION TECHNOLOGY			
102902		Transitory Electronic Data Processing (EDP) Records	SO	nil	DE

Schedule Code Key: *ARCS* = *Administrative Records Classification System*, schedule 100000.
BRMP = *Business Risk Management Programs*, schedule 147650.

END OF OVERVIEW

BUSINESS RISK MANAGEMENT PROGRAMS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (*ORCS*)

INDEX

This index contains an alphabetical listing of:

- all keywords from primary titles;
- all keywords from secondary titles;
- keywords from primary scope notes;
- common synonyms for indexed keywords; and
- common abbreviations.

Use this index in the following ways:

- to locate the correct primary number to classify documents;
- to retrieve, by subject, documents which have been classified and filed; and
- to access the contents of your *ORCS*.

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.

This information schedule is approved in accordance with the *Information Management Act* (SBC 2015, c. 27) and constitutes authority for retention and disposition of the records it covers. Consult your Records Officer.

SUBJECT HEADINGS	PRIMARY NUMBERS
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AGRICULTURE WILDLIFE	61500
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AGRISTABILITY	
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- data	61400
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- C -	
CANADIAN INCOME STABILIZATION PROGRAM (CAIS)	61000
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