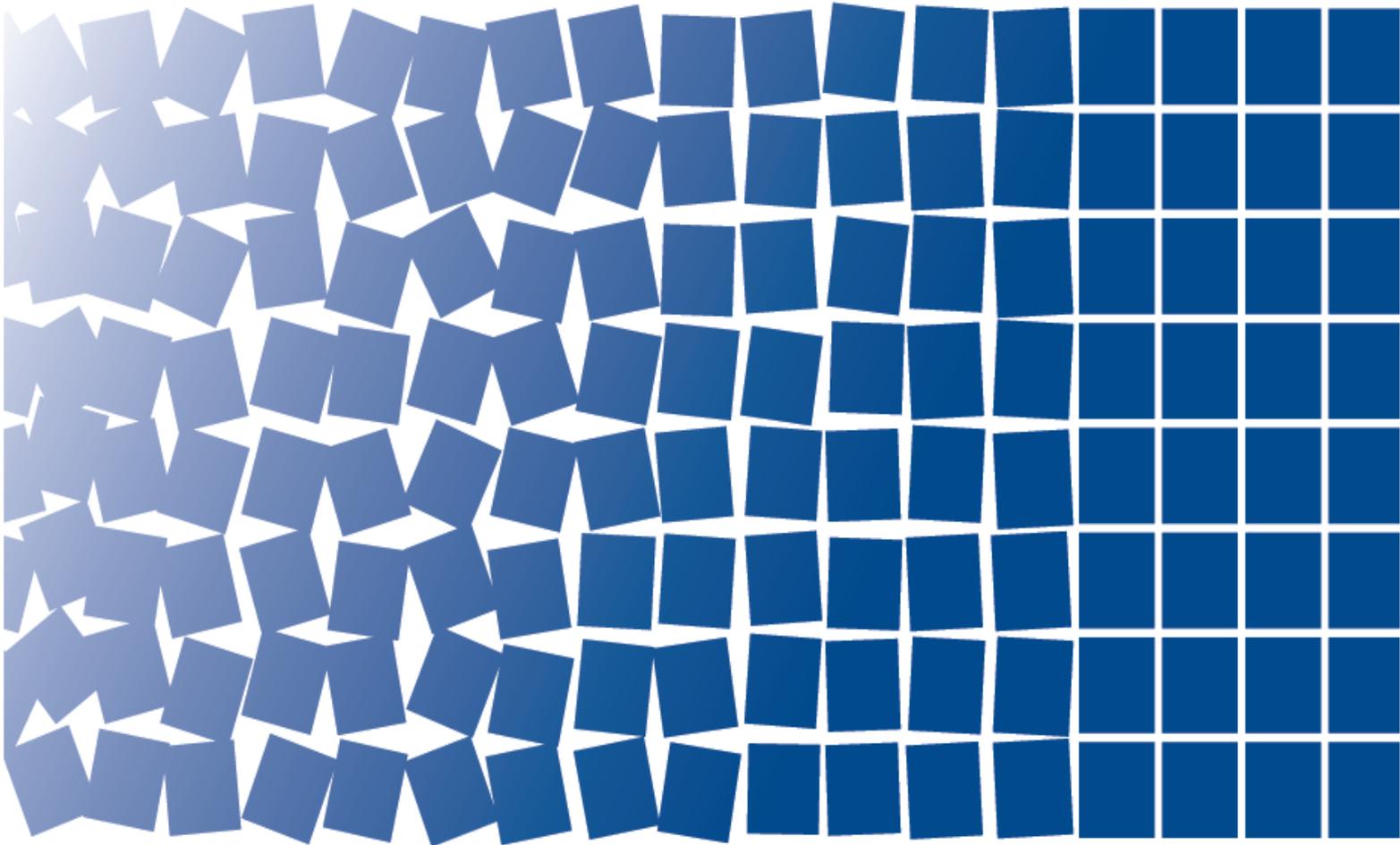


ARCHIVES AND RECORDS OPERATIONAL RECORDS CLASSIFICATION SYSTEM



GOVERNMENT RECORDS SERVICE

ARCHIVES AND RECORDS

OPERATIONAL

RECORDS

CLASSIFICATION

SYSTEM



**Province of
British Columbia**

**Corporate Records
Management Branch**

Schedule No. 881148

RECORDS RETENTION AND DISPOSITION AUTHORITY

Amendment No. 143287

This is a recommendation to amend the above-noted records schedule.**Title:** *Archives and Records Operational Records Classification System, amendment 1*Ministry of Management Services
Corporate and Information Programs
British Columbia Archives**Description and Purpose:**

The purpose of this amendment is to update the *ORCS* to reflect recordkeeping changes occurring over the past ten years. In addition to changes to the structure and content, the title of the *ORCS* will change from the *British Columbia Archives and Records Service ORCS*.

The records in this *ORCS* document the administration and control of archival and records management programs, control of government and non-government records, preservation and conservation of BC Archives holdings, and public programs developed and delivered by BC Archives.

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

Date range: 1871 ongoing**Physical format of records:** see attached schedule**Annual accumulation:** 8 cubic meters**Recommended retention and disposition:** scheduled in accord with attached records schedule.**THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:**

Blair Turner April 22, 2003
Records Officer Date

P. Dreser May 1, 2003
Executive Director/ADM Date

[Signature] May 4, 2003
Deputy Minister/Corporate Executive Date

THE PUBLIC DOCUMENTS COMMITTEE CONCURS:
Salmitcher 2003/05/08
Chair, PDC Date

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

2003/05/28
Date

APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY:

2003/05/29
Date

OTHER STATUTORY APPROVALS:

Signature
Title:

Date

Signature
Title:

Date

CONTACT: Blair Turner, Ministry Records Officer, 387-2887

RECORDS MANAGEMENT APPRAISAL:

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

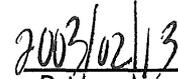
These records are created and received under the authority of the *Document Disposal Act* (RSBC 1996, c. 99) and the *General Management Operating Policy (GMOP)*, and subsequent legislation governing the operational responsibilities and functions of the creating agency.

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

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



Records Analyst



Date

ARCHIVAL APPRAISAL:

This appraisal documents the recommendation for final disposition.

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

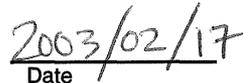
Record series or groups of records which will be retained in their entirety are indicated by "Full Retention."

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

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



Archivist



Date

The undersigned endorses the appraisal recommendations:



Manager, Government Services Section, BC Archives



Date



Schedule No.

881148

Accession No.

See ORCS "Introduction" part 2.6.1 (c)

RECORDS RETENTION AND DISPOSAL AUTHORITY

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

Record Series, Subject Section, Records Classification System, or Application Title: British Columbia Archives and Records Service Operational Records Classification System

Ministry: **Government Services**
Division: **Community Programs and Services**
Branch: **British Columbia Archives and Records Service**

Description and Purpose: Administrative Operational Both
The British Columbia Archives and Records Service Operational Records Classification System (ORCS) covers all operational records created, received, and maintained by the British Columbia Archives and Records Service. These records document the provision of centralized archives and records management services to government agencies, including administration of the Document Disposal Act. BCARS acquires, preserves and makes available records of enduring value regardless of media or format. Includes the archival holdings of the Province of British Columbia. For further descriptive information about these records, please refer to the attached executive summary.

Dates: **20 July 1871 ongoing** Physical Format of Records: **see attached schedule**

Extent: **5 m³/year** Cubic Metres No. of Pieces **n/a**

Have documents been microfilmed? Yes No Is the information in this record series recorded in any other form besides microfilm? Yes (See Records Management Appraisal) No

Recommended Retention: Dispose immediately Dispose on _____ day of _____, _____ Dispose in accord with attached disposal instructions. Scheduled in accord with attached Records Retention and Disposal Schedule.

Recommended Disposition: Destruction Full Retention by Archives Selective Retention by Archives Scheduled in accord with attached Records Retention and Disposal Schedule.

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:
[Signature] **31 May 94**
Director/Executive responsible for records Date
[Signature] **94/06/01**
Deputy Minister/Corporate Executive Date
Minister Date
THE PUBLIC DOCUMENTS COMMITTEE CONCURS:
[Signature] **JUN 8 1994**
Chairman PDC/Provincial Archivist Date

THE EXECUTIVE COUNCIL APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE:
O.I.C. Number _____ Date _____
THE SELECT STANDING COMMITTEE ON PUBLIC ACCOUNTS APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE.
APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY ON **JUL 07 1994**
Date

OTHER STATUTORY APPROVALS:
Signature _____ Date _____ Signature _____ Date _____
Title _____ Title _____

This appraisal documents the recommendation for active and semi-active retention periods.
Ministry contact, title, and telephone: Lynne Tibbitt, Records Analyst, 387-4120

These records are created and received under the authority of the Document Disposal Act (RSBC 1979, c. 95), and subsequent legislation governing the operational responsibilities and functions of the creating agency.

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

The retention and final disposition guidelines specified in the attached Operational Records Classification System meet the creating agency's information requirements, ensure fiscal and audit control, protect government's legal rights and liabilities, and provide for effective management of the agency's operational functions. Upon expiry of the active and semi-active retention periods, the records covered by this recommendation will no longer be of any primary value to government. This ORCS also covers all archival holdings of the Province of British Columbia received by BCARS and its predecessor agencies which may date back to 1846 (earliest British Columbia court records) or earlier (manuscript holdings).

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

Upon approval of this ORCS primary 12880 replaces and supersedes ongoing records schedule 891833 and primary 12890 replaces and supersedes 106055. JT

Lynne Tibbitt

Records Analyst

May 30, 1994

Date

ARCHIVAL APPRAISAL:

This appraisal documents the recommendation for final disposition.

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

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

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

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

Lynne Tibbitt, C.A.

Archivist
(Certified Archivist)

94/05/30

Date

Walter J. Mayr Jr. Esq.

Manager, Appraisal & Acquisition Section

94/05/30

Date

The undersigned endorse the appraisals and recommendations:

Deputy Provincial Archivist

Date

Don Cameron

Ministry Records Officer

94/06/01

Date

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

ARCHIVES AND RECORDS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

EXECUTIVE SUMMARY

This *Operational Records Classification (ORCS)* amends the *British Columbia Archives and Records Service ORCS, 1994 Edition* and revises retention and disposition schedules for the operational records created or received by BC Archives under the *Document Disposal Act (RSBC 1996, c. 99)* and the *General Management Operating Policy (GMOP)*.

These records document the administration and control of archival and records management programs, control of government and non-government records, preservation and conservation of BC Archives holdings, and public programs developed and delivered by the government archives.

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

This *ORCS* covers records created and received since July 20, 1871.

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

- | | |
|--|--------------------|
| 1) <u>Policy and Procedures</u>
(secondary -00 throughout <i>ORCS</i>) | SO 5y FR |
|--|--------------------|

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

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A = Active	CY = Calendar Year	SO = Superseded or Obsolete
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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

2) CORPORATE POLICY

These records document records management and archival policies developed for use throughout government.

BC Archives will fully retain corporate policy files (11370-03) because these records have evidential value. They document policies, procedures, standards and guidelines developed for use by government agencies engaged in records management activities. FR

BC Archives will selectively retain corporate policy development files (11370-20), keeping those that branch staff identify as containing significant information about the development and implementation of government-wide records management and archival policies. SR

3) ARCHIVAL AND LIBRARY HOLDINGS

These records document the history of the government and society of British Columbia.

BC Archives will fully retain its archival holdings (12950-20) with certain exceptions, because of their vital importance to the history of British Columbia, its government and society throughout its recorded history. Due to preservation and resource considerations, some holdings will be converted to different formats (e.g., from paper to microfilm or from hard disk to CD ROM). Other records may be removed from archival holdings as a result of re-appraisal or a request to transfer them to another archival repository. Those originals of microfilmed archival records that have unique information or intrinsic value will be retained (12950-25). FR

BC Archives will selectively retain the BC Archives library holdings (12950-50) because they comprise a historical resource valuable to staff and to all citizens. Most library holdings will be permanently retained because their historical value is not diminished over time. Some professional literature, unnecessary duplicates, and other obsolete materials may be removed and destroyed or donated to another library. SR

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A SA FD

4) DOCUMENTATION OF ARCHIVAL AND LIBRARY HOLDINGS

These records document the government and non-government archival holdings in all media, providing information about their creators, functions, history, arrangement, and contents, as well as acquisition, appraisal and deaccessioning decisions made about them, and financial evaluations made where relevant. Archival holdings are also documented under other categories of this executive summary, as noted.

Documentation of archival holdings that will be fully retained, because of the valuable information it contains about the archival holdings of the government archives, includes:

FR

- Archival Documentation Inventory (11000-03)
- Legacy accessioning records for records in all media (12410-30)
- Legacy photograph register (12410-07)
- Microfilm vault indexes (12630-02)
- Documentation of retained electronic systems (12760-30)
- Legacy donor files (12830-14)
- Legacy schedule tracking registers (12830-19)
- Tax appraisal forms register (12900-12)
- Taxation appraisal and certification files (12900-20)
- History/biography development files (13010-30)
- Accession control records (13050-05)
- Shelf list cards (13050-10)
- Finding aid development files (13050-30)
- Legacy access tools for all media (paintings, drawings and prints; maps plans; sound and moving images, textual records; and photographs (13050-40, -45, -50, -55, and -60)
- Name and subject authority records (13150-03, -04, -06, -08)
- Creators of records in archival holdings (13200-20, -25, and -0)
- Film and video catalogues (describing archival holdings) (13200-40)
- Photograph negative conversion lists (14520-30)
- User guides (15100-02)
- Loan registry (15140-03)
- Loan case files (15140-40)

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A SA FD

Documentation of archival holdings that will be selectively retained, to ensure that all valuable information it contains about the archival holdings is preserved, includes:

- Final versions of histories/biographical sketches (1310-20)
- Standardized finding aids (13050-20)
- Microfilm output cumulative report (14435-04)
- Microfilm conversion list (14435-05)
- Department guides/inventories (13050-03)
- Online descriptive indexes (13050-70)
- Legacy research files (13200-50)
- Legacy microfilm registers and lists (14435-30)
- BC Archives web site (15100-25)

SR

The BC Archives will fully retain library access tools (13050-04) because they describe current and past holdings of the BC Archives, and document the history of BC Archives descriptive systems.

FR

5) PRESERVATION AND CONSERVATION OF ARCHIVAL HOLDINGS

These records document the conservation and preservation over time of all media and physical formats of archival holdings and other government records of enduring value.

BC Archives will fully retain the following records because they document the monitoring and assessment of holdings and their environment, and the special treatment, storage, and other measures taken to preserve them:

FR

- Condition treatment reports and slides (14120-20)
- Legacy conservation documentation (14120-30)
- Archives environment committee records (14170-02)
- Hygrothermograph charts (14170-04)
- Logbook of environmental problems (14170-05)
- Conservation products (14200-02)
- Conservation and storage material test results (14200-20)
- Conservation surveys (14260-04)

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A SA FD

BC Archives will selectively retain the following records, keeping those that document significant research, decisions, actions, and plans of the Preservation/conservation program: SR

- Imaging issues files (13770-35)
- Research files relating to archival media material
(secondary -02 in primaries 13910 to 13990)
- Archival media storage and handling files
(secondary -03 in primaries 13910 to 13990)
- Preservation/conservation advisory files
(14000-03 and -20)
- Preservation/conservation reports (14000-05)
- Care and handling research files (14100-02)
- Emergency and disaster plans for records (14150-03)
- Disaster response case files (14150-30)
- Environmental monitoring research files (14170-03)
- Mould/insect infestations/rodents files (14240-02, -03, and -04)
- Conservation priority lists (14260-03)

6) ARCHIVES AND RECORDS INFORMATION SYSTEM (ARIS) SR
(secondary 11000-20)

ARIS is the electronic system used by the BC Archives to manage government's semi-active records and archival holdings.

ARIS will be selectively retained by retaining in electronic form all records in two tables (name authority and maintain existing management units). The ARIS function of producing the indented organizational chart report will also be retained.

7) GOVERNMENT CLIENT RECORDS

These records document records management activities of government clients, and their relationship with the BC Archives.

BC Archives will fully retain client records management plans (11860-02) and records management program reports (11860-40) because they document records management programs in specific ministries and agencies over time. FR

(continued on next page)

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A SA FD

BC Archives will selectively retain client significant issues case files (11860-30), keeping those that document major records management events and activities, and that provide strong evidence of the BC Archives advisory role. SR

8) COMMUNITY ARCHIVAL PROGRAMS

These records document community archives in the province, and their relationship with the BC Archives.

BC Archives will fully retain archival surveys and community archives grant program reports (11950-05) because they provide a profile of community archives in the province. FR

BC Archives will fully retain the Archives Grants Review Committee records (11950-02) because they document funding decision-making and the purposes to which community archives put these funds. Those community archives grant application files (11950-20) that best document the purposes for which grants have been used over time will also be retained. FR

9) GOVERNMENT RECORDS DOCUMENTATION

These records document the management of government records by the BC Archives on behalf of government ministries and agencies. BC Archives manages the physical custody of semi-active government records and the development and approval process for the records schedules that cover them. This includes records classification and scheduling systems for both administrative and operational records (ARCS and ORCS), as well as other ongoing records schedules, special schedules, and one-time schedules. These records also document the appraisal and disposition of government records.

BC Archives will fully retain accession case files (12410-02) because they document specific records created, filed, and sent off-site by government agencies, and the disposition of those records. These files also document records in BC Archives custody, transferred/donated by government and other creating agencies. FR

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	<u>A</u>	<u>SA</u>	<u>FD</u>
BC Archives will fully retain the following records because they document the development, evolution, review, and analysis of integrated records classification and scheduling systems that reflect the operational and administrative functions and records-keeping practices of the BC Government, as well as the archival appraisal of records covered by these systems: ORCS development, review and amendment files (12760-20) ARCS Review Committee decision records (12720-02) ARCS amendment packages (12720-20) Special schedule development files (12790-20)			FR
BC Archives will fully retain schedule application files (12830-03), superseded government-wide records schedules (12830-05), and orders in council for one-time schedules (12830-06) because they document decisions made about the retention and disposition of government records and donated non-government records, and the reasoning behind these decisions. These records also provide valuable information about archival holdings.			FR
BC Archives will fully retain the records of the Public Documents Committee (12830-07) because they document the deliberations of an inter-ministerial body that makes expert, high-level decisions about the disposition of government records.			FR
BC Archives will fully retain other documentation of the disposition of records, including the destruction or transfer to the Archives of government records, and in rare cases their alienation; as well as the transfer of non-government archival holdings to archival repositories. This documentation is covered by: Legacy Records Centre Services disposition register (12430-06) Records of unauthorized shredding, destruction or alienation (12430-20) Permanent transfer requests (12830-04) Legacy de-accessioned records documentation (12830-08)			FR

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A SA FD

10) ACCESS AND OUTREACH

These records document regular activities and special initiatives aimed at providing, encouraging, and where necessary restricting access to archival holdings by the general public and government (not including those records that specifically describe the holdings, which are covered in section 3 of this summary). (Restrictions are in accordance with the *Freedom of Information and Protection of Privacy Act* and other relevant legislation, as well as donor requests.)

BC Archives will fully retain the records review register (15350-03) because it provides a history and inventory of all types of access restrictions to archival holdings. Those access review case files (15350-20) with information not entered in the records review register will also be retained for the same purpose. FR

BC Archives will selectively retain access requests not covered by *FOIPPA* (15350-40 and -45) by keeping significant and representative files, because they document provision of access to sensitive non-government records in the archival holdings. (Access requests covered by *FOIPPA* are classified in *ARCS*, and retained on a similar basis there.) SR

BC Archives will fully retain open house case files (15450-30) because they document infrequent events in which there is high staff participation and significant interaction with the local community. FR

BC Archives will selectively retain archival description documentation, keeping those records that best document the development of descriptive systems and the addressing of descriptive issues over time: SR

- Documentation standards development files (11370-40)
- Arrangement and description issues files (13000-03)
- Descriptive system documentation (13000-05)
- Multi-repository guide records (13000-07)

BC Archives will selectively retain the following files that document significant access projects and initiatives: SR

- Access initiative case files (15150-20)
- Friends of the BC Archives files (15450-02)

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A SA FD

Exhibit files (15450-20)
Outreach and volunteer project case files (15450-40)

BC Archives will selectively retain reference inquiry files (15480-20) by keeping those opened before 1997, as well as significant and representative files opened since that time. These records document the history of access services provided for distant researchers, and research done by archivists on their behalf. SR

11) INTELLECTUAL PROPERTY ISSUES

These records document initiatives to use BC Archives holdings for publications and commercial purposes.

BC Archives will fully retain licensed agent liaison files (15420-05), BC Archives and licensed agent use permissions (15420-20 and -25), and records of BC Archives intellectual property initiatives (15420-35) because they document specific uses of archival holdings in publications and commercial products over time, and the arrangements made to permit and enable these uses. FR

12) GENERAL DOCUMENTATION

BC Archives will selectively retain archives and records reports and studies (11000-05) by keeping those that best document decisions, actions, structure, and other historical information (including reports of grants received) regarding the Archives and its predecessors. SR

BC Archives will retain paper copies of designated pages from the Corporate Records Management web site (11000-25) because they document the provision of general information about CRM programs and services to its clients. SR

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

13) OTHER SIGNIFICANT PROJECTS AND INITIATIVES

These records document significant projects and initiatives undertaken and participated in by the BC Archives, that do not fit into any of the other categories of this executive summary.

BC Archives will fully retain electronic information management reports (12000-03) because they document research, analysis, and actions taken relating to the management and archival preservation of electronic records of the BC Government. FR

BC Archives will fully retain appraisal and selection project records (12800-10) because they document a variety of initiatives to address a key decision-making process in archival work. FR

BC Archives will selectively retain national/ international project case files (11000-30), keeping those that best reflect BC Archives participation and activities SR

BC Archives will selectively retain significant cross-government records management project files (11860-10) because they document the central agency role in major records management projects. SR

14) RECORDS STORAGE FACILITY DOCUMENTATION

These records document the management of storage facilities and the disposition process for the government records stored there.

BC Archives will selectively retain records storage facility contract files (12400-20) by keeping those that document the records storage management function, the relationship between BC Archives and the contractors carrying out this function, and the records destruction process (i.e., signed contracts, contract monitoring records, correspondence, documentation of destructions, and documentation of significant issues). SR

BC Archives will also selectively retain e-records storage projects and plans (12600-06) and microfilm vault projects and plans (12630-06) by keeping significant files, because they document the history of these facilities and their management. SR

(continued on next page)

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

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

15) SPECIAL CATEGORIES OF RECORDS FOR DESTRUCTION

These records document a variety of functions. The specific reasons why they can be destroyed are stated in explanatory notes under the relevant secondaries.

- Internal policy development files (11370-30)
- Community archives grants register (11950-06)
- ARCS development and amendment files (12720-30)
- Filming project case files (14435-20)
- Legacy restriction files. (15350-35)
- Preservation database (13900-20)

16) RECORDS RETAINED (ACTIVE/SEMI-ACTIVE) MORE THAN 7 YEARS

The following records will be retained in active or semi-active storage for an additional eight to ten years after files are closed, for operational or reference purposes, or to comply with financial or legislative requirements:

- Archives and records reports and studies (11000-05)
- Grant applications submitted by BC Archives (11000-23)
- Records management reports (11860-40)
- Legacy deaccessioned records documentation (12830-08)
- Taxation appraisal and certification files (12900-20)
- Emergency and disaster plans for records (14150-03)
- Access initiative case files (15150-20)
- Use permissions - licensed agent (15420-25)
- Exhibit files (15450-30)

The following records will be retained ten years prior to destruction, in order to provide sufficient time to determine that an item or box is missing:

- Documentation of records retrieval (Reference Services)
(15480-07, -08, -09, and -10)
- Documentation of records retrieval and return (Storage Facility)
(12760-06 and -07)

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A SA FD

17) All Other Records

DE

All other records are destroyed at the end of their semi-active retention periods. The retention of these records varies depending on the nature of the records and the function performed, but does not exceed seven years. The information these records contain is summarized elsewhere, or reflects policies and procedures adequately documented in records covered by the -00 Policy and procedures secondaries. Significant issues are documented in records which will be retained under the provisions of this ORCS, as well as in briefing notes to the ministry executive (ARCS secondary 280-03). These records have no enduring value to government at the end of their scheduled retention periods.

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HOW TO USE ORCS

For further information, call your Records Officer,
Blair Turner, 387-2887

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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HOW TO USE *ORCS*

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

PART 1

THE OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

1.1 General Introduction

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

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

1.2 What is an ORCS?

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

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

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

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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What are Operational Records?

Operational records relate to the operations and services provided by a ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or policy. Operational records are distinct from administrative records and are unique to each government organization.

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

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

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

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

The Purpose of *ORCS*

ORCS facilitates the efficient management of operational information by:

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

Responsibility for *ORCS*

The British Columbia Archives is responsible for establishing standards for the development of *ORCS* for the operational records of public bodies covered by the *Document Disposal Act* (RSBC 1996, c.99).

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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1.3 Introduction to the ARCH ORCS

The operational records in this *ORCS* relate to the operations and services provided by your branch in carrying out the functions for which it is responsible according to statute, mandate, or policy. These records document the administration and control of archival and records management programs; the control of government and non-government records; the preservation and conservation of all BC Archives holdings; and public programs developed and delivered by the government archives.

This *ORCS* covers all operational record series created or received by your branch since July 20, 1871. It does not cover files closed before that date. To obtain approval for disposition of such records, contact your Records Officer. This *ORCS* is an amendment to the original *British Columbia Archives and Records Service ORCS*, which was approved by resolution of the Legislative Assembly on July 07, 1994, and supersedes that schedule. A summary of changes to the original *ORCS* is included in Appendix B.

ORCS are divided into two types of sections: one or more numbered sections covering broad groupings of primary subjects corresponding to major operational functions and program activities; and an Information System Overview Section, which identifies and describes electronic records. This *ORCS* includes the following sections:

Section Number	Primary Numbers	Section Title
Section 1	11000 - 12399	ARCHIVES AND RECORDS

Covers records relating generally to the administration and control of archival and records management programs under *the Document Disposal Act* (RSBC 1996, c. 99) and the *General Management Operating Policy (GMOP)*. This includes records relating to: developing archival and records management policies, procedures and standards; establishing government-wide rules and effective controls for the creation and maintenance of records; advising client agencies on archival and records management issues and concerns; researching and reporting on electronic information management issues; and providing assistance to, and liaison with, community archives throughout the province.

Section 2	12400 - 13299	RECORDS CONTROL
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Covers records relating to the control of government and non-government records under *the Document Disposal Act* (RSBC 1996, c. 99) and the *General Management Operating Policy (GMOP)*. This includes records relating to: the accessioning and transfer of records into semi-active and archival storage and custody; the acquisition, appraisal, selection, arrangement and description of archival records; the classification and scheduling of government records; location control for archival holdings; the retrieval of master security microforms; the retrieval of records for appraisal purposes; the evaluation and technical assessment of imaging projects in client agencies; the disposition of records in storage facilities; and information about contracted records storage facilities. This section also covers the control of BC Archives library holdings.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Section 3	13900 - 15000	PRESERVATION AND CONSERVATION
<p>Covers records relating to the preservation and conservation of all BC Archives holdings, regardless of media, as well as other government records of enduring value that have not yet been transferred to the Archives. This includes records relating to: establishing requirements for the care and handling, environmental conditions, pest control, and storage and housing of archival holdings in all media; reporting on the condition and treatment of archival holdings; testing and analyzing archival conservation and storage materials; surveying archival records in order to determine conservation and preservation needs and to establish treatment priorities; preparing emergency and disaster preparedness plans for the protection of archival records; microfilming archival holdings; duplicating photographic holdings that require conservation and preservation; processing orders for reproductions of archival material; and processing microfilm and photographic image orders.</p>		

Section 4	15100 - 15499	PUBLIC PROGRAMS
<p>Covers records relating to public programs developed and delivered by the government archives. This includes records relating to: providing access to records in the control and custody of the BC Archives in compliance with the <i>Freedom of Information and Protection of Privacy Act</i> (RSBC 1996 c. 165) and other relevant legislation; responding to research inquiries; planning and implementing outreach activities such as tours, exhibits, and volunteer work; responding to requests for permission for the commercial use of archival materials; lending archival holdings to internal and external agencies; and managing initiatives to allow greater public access to provincial archival holdings and other government records.</p>		

ISO	ARIS	Archives and Records Information System
<p>ARIS is the database used to manage government's semi-active records and archival holdings. It registers and tracks the off-site storage of semi-active and inactive (and upon request, active records) of ministries/agencies; carries out automated processes, such as notification of records disposition and destruction processing; enables data supplied by ministries/agencies to be used by BC Archives to apply records retention schedules, perform archival selection, and respond to FOI and reference requests; maintains a comprehensive organization chart of government over time (also known as the name authority) which, among other functions, tracks records custody and control; tracks the records scheduling process and maintains information about the context in which records were created, used, and acquired by BC Archives. ARIS also serves as an index to paper accession and schedule application files, and as a source of reports used for a variety of projects.</p>		

ISOW	BCAW	British Columbia Archives Web site
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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The purpose of the site is to provide internet access to information about BC Archives and its holdings. The intended audiences are the general public and government archival staff.

ISOW

CRMW

Corporate Records
Management Web site

The purpose of the site is to provide internet access to government records management policy, procedures, guidelines, and standards and other records management resource material. The intended audience is government records management staff.

Within each section, primaries are presented in numerical order and grouped as follows:

- First, there is a section default primary, which provides general information relating to the whole section and to records repeated in other primaries throughout the section (“reserved secondaries” - see 2.6.1).
- The section default primary is followed by all the other primaries, arranged in alphabetical order.
- Groups of related primaries, called “primary blocks”, appear together, indicated by two-part titles and an initial “general” primary (for example, “Client Group Issues - General” and “Client Group Issues - Families”).

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

- Executive Summary (provides a high-level overview of the *ORCS*)
- Table of Contents
- How to Use *ORCS* (this section)
- Glossary of Terms (provides useful definitions of records management terminology used throughout the *ORCS*)
- Index (aids in classifying and finding records - see 3.6 for further discussion)
- Appendices (provide codes and other information useful for classifying and understanding the records - see 3.6 for further discussion)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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PART 2

HOW TO READ A PRIMARY

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

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

- 2.1 Primary Number and Title
- 2.2 Scope Note
- 2.3 Cross References
- 2.4 Records Retention and Disposition Schedule
 - 2.4.1 Active retention period column
 - 2.4.2 Semi-active retention period column
 - 2.4.3 Final disposition column
- 2.5 Office of Primary Responsibility (OPR)
- 2.6 Secondary Number and Title
 - 2.6.1 Reserved secondaries
 - 2.6.2 Secondaries -02 to -19 (subject secondaries)
 - 2.6.3 Case file secondaries (-20 and higher)
 - 2.6.4 Coded series
- 2.7 Key of Terms (Abbreviations in Footer)
 - 2.7.1 Terms used in the active and semi-active disposition columns
 - 2.7.2 Terms used in the final disposition column
 - 2.7.3 Other terms
- 2.8 Freedom of Information and Protection of Privacy Flags
- 2.9 Explanatory Notes
 - 2.9.1 Qualifiers
 - 2.9.2 Other notes
- 2.10 Physical Format Designations
- 2.11 Vital Records Flags

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

A = Active	CY = Calendar Year	SO = Superseded or Obsolete
SA = Semi-active	FY = Fiscal Year	DE = Destruction
FD = Final Disposition	NA = Not Applicable	SR = Selective Retention
PIB = Personal Information Bank	w = week m = month	FR = Full Retention
PUR = Public Use Records	y = year	FOI - Freedom of Information/Privacy
OPR = Office of Primary Responsibility		VR = Vital Records
I:\430-30\ufo_orcs.doc:2001/07/01	Schedule 77777	ORCS/UFO
		HOW TO USE - 11

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.1 Primary Number and Title

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

2.2 Scope Note

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

2.3 Cross References

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

2.4 Records Retention and Disposition Schedule

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

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

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

2.4.1 Active Retention Period Column

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

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

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

CY+1y

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

FY+1y

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

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

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

2.4.2 Semi-active Retention Period Column

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

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

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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2.4.3 Final Disposition Column

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

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

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

2.5 Office of Primary Responsibility (OPR)

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

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

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

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

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

2.6 Secondary Number and Title

Secondary numbers and titles designate specific series or groupings of records relating to the function covered by the primary. Secondary titles describe specific types of

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records and secondary numbers link them to the records retention and disposition schedule. The two-digit secondary number is added to the five-digit primary number to form a complete file number, for example, 23120-04.

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

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

2.6.1 Reserved Secondaries

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

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

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

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

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

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

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

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2.6.2 Secondaries -02 to -19 (subject secondaries)

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

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

2.6.3 Case File Secondaries (-20 and higher)

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

2.6.4 Coded Series

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

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

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

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

2.7 Key of Terms (Abbreviations in Footer)

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

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

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

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

w = week

m = month

y = year

CY = Calendar Year (1 January to 31 December)

FY = Fiscal Year (1 April to 31 March)

SO = Superseded or Obsolete

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

i) Routine Records

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

The most common form of delegated disposition authority is:

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

This retention category is used throughout *ORCS* to streamline the disposition of records with short-term retention value, especially for non-OPR records. It delegates the entire responsibility for retention and disposition of the records to the ministry or agency responsible for them. Records with the above retention and disposition schedule may be destroyed when no longer required for operational purposes. In the

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sample primary, non-OPR policy and procedures files (secondary -00) are routine records which are designated SO.

For information on destruction services, contact your Records Officer.

ii) Specific Definition of SO

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

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

NA = Not Applicable

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

nil = no semi-active retention period

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

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

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

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2.7.2 Terms Used in the Final Disposition Column

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

Some government records contain information or data that has long-term value to the agency responsible for them, the government generally, and/or to the public. These records are part of the documentary heritage of the Province of British Columbia and are transferred to the custody of BC Archives for archival preservation. The final disposition of operational records with enduring value can be full retention, selective retention, or destruction, as explained below.

FR = Full Retention

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

SR = Selective Retention

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

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

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

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

DE = Destruction

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

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

NA = Not Applicable

See explanation of NA in 2.7.1.

2.7.3 Other Terms

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

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

2.8 Freedom of Information and Protection of Privacy Flags

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

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

For further information about FOI issues, see 3.10.

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2.9 Explanatory Notes

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

2.9.1 Qualifiers

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

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

2.9.2 Other Notes

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

- OPR =** This note provides the name of the office of primary responsibility if it is different from the primary default OPR. See discussion of OPR in section 2.5.
- SO =** This note explains when a file designated SO should be closed. See discussion of SO in section 2.7.1.
- ##y =** This note gives reasons for active and/or semi-active retention periods which are longer than seven years. In the sample primary, there is a “303y =” note under secondary -20.
- NA =** This note explains why the usual active, semi-active, or final disposition designation does not apply, usually because records have been reclassified or transferred to another agency. See discussion of NA in section 2.7.1.

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SR/FR/DE = These notes explain why records are being selectively or fully retained, or (if not self-evident) why they are being destroyed. See discussion of these notes in section 2.7.2.

FOI: This note explains issues of confidentiality relating to the records. See discussion of the FOI note in section 2.8.

NOTE: This note provides any other useful information related to the scope of the secondary, such as history of the records, volume of the records, filing procedures, whether there is an ongoing accession number, or location of copies. In the sample primary, secondary -20 has a note specifying that when the files go offsite, they will be stored “under ongoing RCS accession number 99-9111.” For discussion of ongoing accession numbers, see section 3.9.1(b).

2.10 Physical Format Designations

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

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

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

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

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

2.11 **Vital Records Flags**

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

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

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PART 3

ORCS AND AN EFFECTIVE RECORDS MANAGEMENT SYSTEM

3.1 The Purpose of ORCS

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

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

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

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

3.2 Records and Recorded Information

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

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

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

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

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The *Document Disposal Act* establishes procedures for the approval of the records schedules and classification systems developed by BC Archives, government ministries, and other government agencies. This *ORCS* was reviewed by BC Archives staff, your executive, the Public Documents Committee, and the Select Standing Committee on Public Accounts (commonly called the Public Accounts Committee). It was then approved by resolution of the Legislative Assembly. That resolution established this *ORCS* as the retention and disposition schedule for the operational records of the Branch. This means that this *ORCS* is a legally binding document.

3.3 An Effective Records Management System

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

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

3.4 The Classification System

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

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

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

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

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

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

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

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

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

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

3.4.1 Staff Responsibilities and Procedures

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

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

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

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

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3.4.2 Classifying Records

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

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

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

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

a) Alphabetic Subject Index

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

b) Broad Subject Approach

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

3.5 The File List

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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

3.6 Other Finding Aids

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

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

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

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

Appendix A is a summary of the Archival Documentation Inventory (ADI) which was developed as part of a survey of all existing BC Archives accessioning systems. The summary list includes the ADI number assigned to each system, and also the *ORCS* secondary number where the legacy accessioning system is classified.

Appendix B is a summary of the changes to the approved *British Columbia Archives ORCS*.

3.7 The Scheduling System

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

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

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

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

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

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

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

3.8 Filing and Maintenance Procedures

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

The basic activities involved in filing and maintenance are:

- mail management
- sorting
- registration
- classification
- indexing and cross-reference
- location control
- filing
- charge-out
- distribution

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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- recall and search
- re-filing
- physical maintenance
- purging
- retention and disposition

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

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

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

3.8.1 File Maintenance

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

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

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

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

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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

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

Minimize misfiling in the following ways:

- keep file labels legible and simple
- maintain 3-4 inches of free space on each file shelf or drawer
- place papers in folders so they do not go beyond the scoring on the folder or cover the file label
- write the correct file number or heading on each document or underline it if it appears in the text

3.8.2 File Circulation

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

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

3.9 Boxing and Transfer Instructions

The records schedules contained in *ORCS* specify the active, semi-active, and inactive phases of the life cycle of the record and provide for the efficient and systematic transfer of semi-active and inactive records to the off-site storage facilities provided by Records Centre Services, BC Archives. Each office should document instructions and

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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procedures for the regular boxing and transfer of records to off-site storage. (For further discussion of records scheduling, refer to 2.4 and 2.7.)

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

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

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

3.9.1 Accession Numbers

Records Centre Services issues and tracks all accession numbers. An accession number is a number identifying a group of records to be transferred, and is used to label, transfer and store records. Each box within an accession is given a unique box number by adding sequential numbers, beginning with number one, to the accession number. The full number must appear on the label of each box.

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

Box Number: 91-0123-01

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

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

a) One-time Accession Numbers

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

b) Ongoing Accession Numbers (OANs)

BC Archives may establish ongoing accession numbers for categories of administrative or operational records which can be transferred to off-site storage

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or archival custody year after year. The purpose of an OAN is to group together the same type of records from the same office, and facilitate transfer of those records. The OAN for a category of records must only be used for future transfers of the same type of records.

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

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

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

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

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

If several offices are responsible for transferring records of the same type to semi-active storage or archival custody, each office will be assigned its own OAN. Other special arrangements may be made in consultation with your Records Officer and Records Centre Services.

c) Ongoing Accession Numbers for BC Archives

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

OAN	Primary and Secondary No.	Primary and/or Secondary Title	SA	FD
91-4043	12410-02	Accession files OAN title: Oversize accession detailed file lists	Active storage SO	FR

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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91-0360 12950-30 Reappraised and
deaccessioned records

For further information about ongoing accession numbers and lists of the numbers, contact your Records Officer.

3.9.2 Transfer of Records to Off-Site Storage

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

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

a) Arranging Boxes

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

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

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7. If records have different semi-active retention periods, box first by retention period and then within retention period by primary and secondary numbers.

b) **Box Numbering**

Arrange and number boxes that have similar classifications, date ranges, retention periods and final dispositions consecutively according to the date range of the records (e.g., accounts payable, fiscal year 1994/95 in boxes 1 & 2; accounts payable, fiscal year 1995/96 in boxes 3 & 4; accounts payable, fiscal year 1996/97 in boxes 5 & 6).

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

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

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

3.10 Freedom of Information and Protection of Privacy

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

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

3.11 Electronic Records and the Information System Overview

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

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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

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

3.12 Implementation of ORCS

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

The Records Officer plans and coordinates the implementation of *ORCS*.

The eight requirements for implementation and maintenance of *ORCS* are:

1. Executive support.
2. A records management policy.
3. An implementation and training plan.
4. Designated responsibilities for implementation and maintenance of *ORCS*.
5. Designated offices of primary responsibility for types of operational records requiring multiple levels of retention.
6. Training in *ORCS* and general records management for support staff in a training program established by your Records Officer.

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7. Established procedures for the storage and retrieval of semi-active records and disposition of inactive records.
8. Established maintenance, review, and update procedures under the administration of the Records Officer.

3.13 Advisory Services

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

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

3.14 Amendment and Update of ORCS

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

Effective maintenance depends upon:

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

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

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

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

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

- || Double vertical bars indicate a proposed change at the primary or secondary level or to a scope or explanatory note. Proposed changes may be used for classification purposes, but require the approval of the Legislative Assembly before they may be used for records disposition actions.
- A bullet indicates a change at the primary or secondary level which has been approved by the Legislative Assembly.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

SECTION 1

ARCHIVES AND RECORDS

PRIMARY NUMBERS

1 1 0 0 0 - 1 2 3 9 9

Section 1 covers records relating generally to the administration and control of archival and records management programs under *the Document Disposal Act* (RSBC 1996, c. 99) and the *General Management Operating Policy (GMOP)*. This includes records relating to: developing archival and records management policies, procedures and standards; establishing government-wide rules and effective controls for the creation and maintenance of records; advising client agencies on archival and records management issues and concerns; researching and reporting on electronic information management issues; and providing assistance to, and liaison with, community archives throughout the province.

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

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A SA FD

11000 ARCHIVES AND RECORDS - GENERAL

Records not shown elsewhere in the archives and records section which relate generally to the administration and control of archival and records management programs.

This primary also covers grant applications submitted by BC Archives. Grant funding is available from organizations such as the Canadian Council of Archives and Industry Canada.

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

For information about the Archives and Records Information System (ARIS), see the Information System Overview (ISO) section. For information about the Information Management web site, see the ISO section.

For grants provided by BC Archives, see primary 11950.
For legal opinions regarding applicability of *the Document Disposal Act* and the *Freedom of Information and Protection of Privacy Act*, see *ARCS* secondary 350-20.

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

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under *ARCS* secondary 202-20 or 204-20.

Unless otherwise specified below, the ministry OPR (Belleville and Yates central files) will retain these records for:

CY+2y nil DE

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

SO nil DE

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

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

(continued on next page)

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

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		A	SA	FD
11000	<u>ARCHIVES AND RECORDS - GENERAL</u> (continued)			
-01	General			
-02	Archives and records – other jurisdictions (includes correspondence, studies and reports)	SO	nil	DE
	NOTE: Secondary -02 is used for general correspondence and reference material relating to archival and records management programs in the private sector, educational institutions, local governments, other provinces, the United States and other foreign countries.			
	Records of community archives programs in other jurisdictions are classified under secondary 11900-02.			
-03	Archival documentation inventory (ADI)	SO	nil	FR
	OPR = Information Management Systems and Standards			
	SO = when an updated version is issued			
	FR = BC Archives will fully retain the archival documentation inventory because it identifies and describes the archival record keeping and control systems used by the Archives over time.			
	NOTE: This descriptive inventory is the result of a 1999 survey of all existing BC Archives accessioning systems and access tools, both active and closed. Most of these are identified as “legacy” systems and tools in secondary titles in Section 2 of this ORCS. Each legacy system was assigned a number beginning with the code “ADI”, and a label with this number was placed on the container for the system. A list of the ADI systems and tools is provided in Appendix A. In addition, ADI numbers are noted under some of the relevant secondaries.			
-05	Archives and records reports and studies (covers both formal and informal reports [i.e., memos], including annual reports on specific programs/sections)	SO+5y	5y	SR
	SO = upon final distribution or publication of report or study			

(continued on next page)

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

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		<u>A</u>	<u>SA</u>	<u>FD</u>
11000	<u>ARCHIVES AND RECORDS - GENERAL</u> (continued)			
	10y = required for reference purposes			
	SR = BC Archives will retain those archives and records reports and studies that best document decisions, actions, structure, and other historical information (including reports of grants received) regarding the Archives and its predecessors. All other reports and studies will be boxed separately and destroyed.			
-20	Archives and Records Information System (ARIS) (electronic database)	SO	nil	SR
	SO = when the function it supports is no longer performed by the provincial government			
	SR = ARIS will be selectively retained by retaining in electronic form all records in two tables (name authority and maintain existing management units). The ARIS function of producing the indented organizational chart report (ARS 472) will also be retained.			
	The name authority and the indented organizational chart report will be retained because they provide a comprehensive organizational chart of the BC Government over time, and the ability to view the hierarchical structure of any given ministry or program since 1991.			
	The "maintain existing management units" table will be retained because this provides an essential index to the paper accession and application files (secondaries 12410-02 and 12830-03), which are scheduled for full retention. Used in conjunction with the name authority, it also provides a means to identify records associated with a particular creating/ transferring agency.			
-23	Grant applications submitted by BC Archives (includes applications, grant information brochures, copies of cheques and reports describing the funded projects and how the grant money was allocated) (arrange by grant program)	SO+8y	nil	DE

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
11000	<u>ARCHIVES AND RECORDS - GENERAL</u> (continued)			
	SO = when application is approved and the project is completed; or when application is denied			
	8y = required for reference purposes			
	NOTE: File a copy of each grant final report under archives and records reports and studies (secondary 11000-05).			
-25	Corporate Records Management web site	SO	nil	SR
	SO = when the web site is updated, redesigned or closed			
	SR = BC Archives will retain paper copies of designated pages from the Corporate Records Management web site because they document the provision of general information about CRM programs and services to its clients. A copy of each designated page will be printed prior to each significant update. All other records on the web site may be deleted when no longer needed.			
	Pages for retention include the following:			
	<ul style="list-style-type: none">• Main/introductory page• Highlighted programs (currently includes "Preservation" and "Electronic Information Management")• Public Documents Committee (retain all pages under this heading except the minutes, which are retained under secondary 12830-07)• "Additions and Enhancements to This Web Site"• Other pages identified as significant over time			
	NOTE: This web site provides policies, procedures, standards, and general information about records management in the BC Government. All documents presented on the web site are classified under appropriate secondaries within this ORCS or in ARCS.			

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	<u>A</u>	<u>SA</u>	<u>FD</u>
11000	<u>ARCHIVES AND RECORDS - GENERAL</u> (continued)		
-30			
	SO	nil	SR
	National/International project case files (includes drafts, reports, correspondence, and background materials) (arrange by project name) (covers records relating to BC Archives participation in the development of International Standards Organization [ISO] documents, Rules for Archival Description [RAD], multi-repository guides such as the Union List of Manuscripts [ULM], Canadian Archival Information Network [CAIN], InterPARES, and similar projects)		
SR =	BC Archives will retain those national/international project case files that best reflect BC Archives participation in national and international projects. All other records covered by this secondary will be boxed separately and destroyed.		

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A SA FD

11370 ARCHIVAL AND RECORDS MANAGEMENT POLICY
DEVELOPMENT

Records relating to the development of archival and records management policies, procedures and standards. These include “internal” policies, procedures and standards governing operational activities of BC Archives, and “corporate” ones governing records management activities for all government agencies subject to the *Document Disposal Act*.

As the central agency in government responsible for recorded information management, BC Archives maintains the *Recorded Information Management Manual* (RIM). This provides a policy framework for managing records from creation to disposition, with emphasis on records scheduling, control of records located in government-contracted records storage facilities, and management of electronic records. BC Archives also maintains the *Standard ORCS Kit*, which provides the detailed standards for designing an operational records classification system (ORCS). In addition, BC Archives gives input to sections of the *General Management Operating Policy* manual (GMOP) pertaining to records management, and to other policy manuals as appropriate.

BC Archives internal policies relate to all operational functions of the branch, including: managing the records scheduling process, managing records storage, and appraising, preserving, describing, and providing access to archival records, with special attention to electronic archives.

Record types include correspondence, memoranda, and draft and approved policies and standards.

For approved internal policies or standards specific to the subject of a primary, see secondary -00 under the appropriate primary.
 For committees, see ARCS primaries 202 and 204.
 For policy manuals, see ARCS secondary 195-30.
 For program planning, see ARCS secondary 400-20.

Unless otherwise specified below, the ministry OPR (Belleville and Yates central files) will retain these records for:

CY+2y nil DE

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

SO nil DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
11370	<u>ARCHIVAL AND RECORDS MANAGEMENT POLICY DEVELOPMENT</u> (continued)				
-00	Policy and procedures	- OPR - <u>non-OPR</u>	<u>SO</u> <u>SO</u>	<u>5y</u> <u>nil</u>	<u>FR</u> <u>DE</u>
-01	General				
-03	Corporate policy (includes policy, procedures, standards and guidelines) (arrange by policy number)		SO	nil	FR
	FR = BC Archives will fully retain corporate policy files because these records have evidential value. They document policies, procedures, standards and guidelines developed for use by government agencies engaged in records management activities.				
-05	Policy registers (covers listings of branch-developed policies, procedures and standards, maintained for the purposes of assigning policy numbers and tracking approval status)		SO	nil	DE
-20	Corporate policy development files (includes briefing notes, correspondence, policy drafts, and background materials) (arrange by policy number)		SO+5y	nil	SR
	SO = when the policy has been approved and distributed or abandoned				
	SR = BC Archives will retain those corporate policy development files that branch staff identify as containing significant information about the development and implementation of government-wide records management and archival policies. All other files covered by this secondary will be boxed separately and destroyed.				
-30	Internal policy development files (arrange by policy number)		SO+5y	nil	DE

(continued on next page)

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	<u>A</u>	<u>SA</u>	<u>FD</u>
11370	<u>ARCHIVAL AND RECORDS MANAGEMENT POLICY</u>		
	<u>DEVELOPMENT</u> (continued)		
	DE = Internal policy development files will be destroyed because policies that apply only to BC Archives work are adequately documented in the approved policies classified under relevant -00 policy and procedures secondaries.		
-40	Documentation standards development files (includes correspondence, drafts, and background materials) (arrange by subject)	SO	5y SR
	SR = BC Archives will retain those documentation standards development files that branch staff identify as containing significant information about the development and implementation of standards. All other files covered by this secondary will be boxed separately and destroyed.		
	NOTE: This secondary covers the research and development of standards for the documentation of records (e.g., archival arrangement and description standards, Archives and Records Information System [ARIS] standards).		

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A SA FD

11860 CLIENT ADVISORY SERVICES

Records relating to advisory services provided to provincial government ministries and agencies, regarding archival and records management issues and concerns. The BC Archives administers the provisions of the *Document Disposal Act (DDA)* and establishes corporate standards for the creation, security, accessibility, retention, disposition and preservation of recorded information. Other services include the maintenance of the government-wide *Administrative Records Classification System (ARCS)*, and the approval process for ministry-specific *Operational Records Classification Systems (ORCS)*. BC Archives also manages the transfer, storage and disposition of government records held in contracted warehouse facilities under *General Management Operating Policy (GMOP)*. These services are sometimes also provided to government agencies not covered by the *DDA* and *GMOP*.

Each BC Government ministry or agency is responsible for establishing a recorded information management program coordinated by a ministry or corporate records officer. Records officers implement ministry/agency records management standards in accordance with government-wide policies, standards and guidelines established by BC Archives.

This primary covers routine liaison with records officers, as well as the resolution of important issues or problems affecting client agencies. These investigations may result in policies and guidelines that apply to more than the ministry/agency that made the initial inquiry.

This primary also covers ministry/agency recorded information plans, BC Archives' review of records management programs, and records of BC Archives' role in developing and implementing government-wide records management systems and programs.

Record types include correspondence, memoranda, plans, research materials, and reports.

For advisory services relating to conservation and preservation issues, see primary 14000.

For ARCS development, see primary 12720.

For BC Archives policies and standards, see primary 11370.

For inquiries relating to specific accession files, see primary 12410.

For ORCS development, see primary 12760.

For research inquiries relating to BC Archives holdings, see primary 15480.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
11860	<u>CLIENT ADVISORY SERVICES</u> (continued)				
	Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Client records management plans (arrange by client agency)		CY+2y	nil	FR
	FR = BC Archives will fully retain client records management plans because they provide a summary record of the state of records management in specific ministries and agencies over time.				
-03	Client records management projects (arrange by client agency) (covers individual ministry/agency projects)		CY+2y	nil	SR
	SR = BC Archives will retain those client records management project files that document significant government records management projects not led by the central agency. All other files covered by this secondary will be boxed separately and destroyed.				
-04	Records officer listing		SO		nil DE
-10	Cross-government records management projects (covers development and implementation of government-wide systems and programs such as CRMS and EDRMS/TRIM)		SO	nil	SR
	SR = BC Archives will retain significant cross-government records management project files because they document the central agency role in major records management projects. Significant files are those containing project reports, briefing notes, and other records reflecting major decisions about projects and the history of projects. All other records covered by this secondary will be boxed separately and destroyed.				

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		<u>A</u>	<u>SA</u>	<u>FD</u>
11860	<u>CLIENT ADVISORY SERVICES</u> (continued)			
-20	Client routine liaison case files (includes correspondence and working notes) (arrange by client agency)	CY+1y	nil	DE
-30	Client significant issues case files (includes correspondence and working notes) (arrange by client agency or issue, as appropriate) (covers issues relevant to one or more ministries or agencies, and other issues warranting a special file)	SO	nil	SR
	SO = when the issue is resolved or closed, and when no longer required for reference purposes			
	SR = BC Archives will retain those case files that document major records management events and activities, and that provide strong evidence of the BC Archives advisory role. All other files covered by this secondary will be boxed separately and destroyed.			
	NOTE: These issues may be client-specific, concern more than one client agency, or may apply across government. Resolution of the issue may result in the development of policy which is classified under secondary 11370-20, or prompt reviews of client agencies' records management procedures which are classified under secondary -40.			
-40	Records management program reports (arrange by client agency)	SO+5y	5y	FR
	SO = upon delivery of final review and evaluation report to the client, and, if applicable, when the client's response is received			
	10y = required for reference purposes			
	FR = BC Archives will fully retain records management program reports because these document formal reviews of client records management programs.			
	NOTE: Secondary -40 covers formal records management reviews that are conducted periodically, as well as ad hoc reviews performed when questionable records management practices arise.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
11900	<u>COMMUNITY ARCHIVES - GENERAL</u>			
<p>Records relating to liaising with and assisting community archives throughout the province not shown elsewhere in this primary block.</p> <p>This primary covers information collected on community archives programs in jurisdictions outside of British Columbia as well as information collected on similar or related funding programs offered by other provincial and federal organizations (e.g., the British Columbia Heritage Trust, Partners in Heritage and the Canadian Council of Archives). This information is used in the development of the BC community archives program, as well as for determining other sources of community archives funding.</p> <p>Records types include correspondence, memoranda, brochures, funding proposal outlines, information sheets, blank application forms, and news releases.</p> <p>Unless otherwise specified below, the ministry OPR (Belleville central files) will retain these records for:</p>				
		CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>				
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures			
				- OPR
		<u>SO</u>	5y	FR
				- <u>non-OPR</u>
		<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-02	Community archives - other jurisdictions (arrange by jurisdiction)	SO	nil	DE
-03	Similar or related community archives programs (arrange by organization offering the program)	SO	nil	DE

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		<u>A</u>	<u>SA</u>	<u>FD</u>
11950	<u>COMMUNITY ARCHIVES - GRANT PROGRAMS</u>			
	Records relating to the provision of grants to archival programs and projects at the community archives level.			
	Two significant programs that operated from 1990 until 2002 were: the Community Archives Assistance Program (CAAP) and the Community Archives Advisory and Training Program (CAAT).			
	CAAP made matching grants available, usually on an annual basis, to non-profit organizations to establish or improve archives. The Archives Grants Review Committee evaluated the applications and made recommendations for the Minister's approval.			
	The second program, CAAT, made grants available on an annual basis to qualified non-profit organizations (e.g., the Archives Association of British Columbia) to deliver services for the general benefit of BC archival institutions. The Provincial Archivist evaluated the letters of application and made recommendations for the Minister's approval.			
	Record types include correspondence, memoranda, applications, reports, and copies of cheque requisitions.			
	For grants that the BC Archives applies for, see secondary 11000-23.			
	Unless otherwise specified below, the ministry OPR (Belleville central files) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR - <u>non-OPR</u>	<u>SO</u> <u>SO</u>	5y <u>FR</u> <u>DE</u>
-01	General			
-02	Archives Grants Review Committee		SO	nil FR
	SO = when the committee is no longer active			
	FR = BC Archives will fully retain the Archives Grants Review Committee records because they document funding decision-making as well as the purposes to which community archives put these funds.			

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	<u>A</u>	<u>SA</u>	<u>FD</u>	
11950	<u>COMMUNITY ARCHIVES - GRANT PROGRAMS</u> (continued)			
	NOTE: These committee files are included in ORCS instead of ARCS in order to schedule them for full retention.			
-04	Community archives grant application requests	SO	nil	DE
	SO = upon expiry of grant deadline			
-05	Community archives grant program reports	SO	nil	FR
	FR = BC Archives will fully retain these reports because they provide a concise summary of the community archives program.			
	NOTE: These reports provide information such as the total number of applications received in a given year, the number of grants awarded and the total value of the grants awarded. They are used for reviewing trends and for program planning purposes.			
-06	Community archives grants register (electronic spreadsheet)	SO	nil	DE
	DE = The community archives grants register will be destroyed because the information it contains is adequately documented in reports classified under secondary 11950-05.			
	NOTE: The register dates back to the inception of the program in 1990, but it is incomplete until 1995. It lists the names of the organizations that applied for CAAP or CAAT grants, whether or not they received funding, the amount received, and the dates the initial and final payments were made.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
11950	<u>COMMUNITY ARCHIVES - GRANT PROGRAMS</u> (continued)			
-20	Community archives grant application case files (arrange by program code, then grant number)	SO+1y	6y	SR

SO = when application is denied or final payment is issued

SR = BC Archives will retain those community archives grant application case files that document the purposes for which grants have been used over time.

CAAT case files which significantly document the services that were provided by grant recipients will be identified and retained. All other CAAT records will be boxed separately and destroyed.

CAAP application case files will be destroyed because the important information about the applications is documented in the Archives Grant Review Committee files, which will be retained by the government archives under secondary -02.

Significant grant application case files relating to other grant programs will be identified and selected by program staff. All other files covered by this secondary will be boxed separately and destroyed.

NOTE: CAAP grant application case files opened prior to September 1993 are filed under *ARCS* secondary 1150-20.

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		A	SA	FD	
12000	<u>ELECTRONIC INFORMATION MANAGEMENT (IM) RESEARCH</u>				
	Records relating to research into a range of emerging electronic recorded information management (IM) issues, such as “e-government”, electronic document management systems, metadata, electronic archives, transfer formats, and web records. The goal of this research is to ensure the integrity, authenticity and ongoing reliability of the electronic corporate memory of the Province.				
	Research involves reviewing and evaluating electronic information management and archival policies, programs and standards of the BC government, other Canadian provinces and provincial archives, national archives in Canada and the United States, and national archives and related associations around the world. Information gathered via the internet and other sources on topical issues may form the nucleus of formal policies, online programs, and information management and archival standards for managing BC government electronic records (or “e-records”).				
	Record types include correspondence, memoranda, copies of policies, procedures, fact sheets, lists of bibliographic and online sources, reports, published articles, and brochures.				
	For client advisory services concerning electronic records, see primary 11860.				
	For the development of policies, procedures and standards for electronic information management, see primary 11370.				
	For electronic access initiatives, see primary 15150.				
	For electronic imaging projects, see primary 13770.				
	For participation in international/national committees, e.g., InterPARES, see primary 11000.				
	Unless otherwise specified below, the ministry OPR (Information Management Systems and Standards) will retain these records for:	CY+2y	nil	DE	
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE	
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12000	<u>ELECTRONIC INFORMATION MANAGEMENT RESEARCH</u> (continued)			
-03	Electronic IM reports and studies (arrange by title)	SO+5y	nil	FR
	SO = when final version of the report or study is issued			
	FR = BC Archives will fully retain electronic information management reports because they document research, analysis, and actions taken relating to the management and archival preservation of electronic records of the BC Government.			
-05	Electronic IM report development files (arrange by title)	SO	5y	DE
	SO = when final version of the report or study has been issued, or the project has been cancelled and the file closed			
-07	Electronic IM research files (arrange by subject)	SO	nil	DE
	NOTE: Records that are used as reference for policy, or in response to a client enquiry, should be copied or transferred to the relevant case file for retention, i.e., classified under a secondary within primary 11370 or 11860.			

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

SECTION 2

RECORDS CONTROL

PRIMARY NUMBERS

1 2 4 0 0 - 1 3 8 9 9

Section 2 covers records relating to the control of government and non-government records under the *Document Disposal Act* (RSBC 1996, c. 99) and the *General Management Operating Policy* (GMOP). This includes records relating to: the accessioning and transfer of records into semi-active and archival storage and custody; the acquisition, appraisal, selection, arrangement and description of archival records; the classification and scheduling of government records; location control for archival holdings; the retrieval of master security microforms; the retrieval of records for appraisal purposes; the evaluation and technical assessment of imaging projects in client agencies; the disposition of records in storage facilities; and information about contracted records storage facilities. This section also covers the control of BC Archives library holdings.

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

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A SA FD

12400 - RECORDS CONTROL - 13899

PRIMARY NUMBERS AND PRIMARY SUBJECTS

- 12400 RECORDS CONTROL - GENERAL
- 12410 ACCESSION CONTROL
- 12430 DISPOSITION CONTROL
- 12490 FACILITIES AND SERVICES
- 12520 LOCATION CONTROL
- 12570 RETRIEVAL CONTROL - GENERAL
- 12600 - ELECTRONIC ARCHIVES STORAGE
- 12630 - MICROFILM VAULT
- 12670 - STORAGE FACILITY

- 12700 CLASSIFICATION AND SCHEDULE DESIGN - GENERAL
- 12720 - ARCS
- 12760 - ORCS
- 12790 - SPECIAL SCHEDULES

- 12800 APPRAISAL AND ACQUISITION - GENERAL
- 12830 - SCHEDULE AUTHORIZATION
- 12900 - MONETARY EVALUATION

- 12950 ARCHIVAL HOLDINGS

- 13000 ARRANGEMENT AND DESCRIPTION - GENERAL
- 13010 - HISTORY/BIOGRAPHY
- 13050 - ACCESS TOOLS
- 13150 - AUTHORITY CONTROL
- 13200 - RESEARCH COLLECTION

- 13770 IMAGING PROJECTS

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A SA FD

12400 RECORDS CONTROL - GENERAL

Records not shown elsewhere in the records control section which relate generally to the BC Archives control of government and non-government records under *the Document Disposal Act (RSBC 1996, c. 99)* and the *General Management Operating Policy (GMOP)*.

Controlling records involves: the accessioning and transfer of records into semi-active and archival storage; the appraisal, selection, acquisition, arrangement and description of archival records; the classification and scheduling of government records; managing the location of semi-active or inactive archival records; maintaining master security microforms; evaluating imaging projects in client agencies; and managing records kept in contracted storage facilities.

Record types include correspondence, memoranda, invoices and contracts.

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

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant ORCS secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under ARCS secondary 202-20 or 204-20.

For ARIS, see the Information System Overview section.

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

CY+2y nil DE

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

SO nil DE

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

OPR = Belleville and Yates central files

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

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12400	<u>RECORDS CONTROL - GENERAL</u> (continued)			
-01	General			
-04	Chargeback of records centre services (includes copies of invoices) (arrange by agency)	FY+1y	6y	DE
	7y = standard retention for financial records in <i>ARCS</i>			
-05	Storage chargeback summary report (ARS 508) (covers ARIS reports printed for records officers)	SO	nil	DE
-20	Records storage facility contract files (includes contracts and related correspondence) (arrange by storage facility)	SO	7y	SR

OPR = Record Centre Services

SO = upon removal of all records from the storage facility

7y = standard retention for contract files in *ARCS*

SR = BC Archives will retain those records storage facility contract files that document the records storage management function, the relationship between BC Archives and the contractors carrying out this function, and the records destruction process. At the time of boxing records, program staff will select sub-files containing signed contracts, contract monitoring records, correspondence, documentation of destructions, and documentation of significant issues. All other files covered by this secondary (containing destruction notices, invoices, contract award records, and other routine records) will be boxed separately and destroyed.

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

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

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

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A SA FD

12410 ACCESSION CONTROL

Records relating to the accessioning and transfer of government and non-government records into semi-active and archival storage.

BC Archives manages contracted records storage and retrieval services for active and semi-active records on behalf of ministries/agencies. In addition, BC Archives applies final disposition (destruction or transfer to the custody of BC Archives) to the records in the accession in accordance with the approved retention schedule.

BC Archives enters documentation supplied by the ministries into the Archives and Records Information System (ARIS). Each records transfer is linked to an 'accession' number that is used to track the records. BC Archives arranges for the records to be transferred to off-site storage, and manages the accession throughout the time it remains in storage. Managing off-site records involves updating access authorizations and documenting any changes to the legal custodian or changes to the content of the accession.

While the records are in active or semi-active off-site storage, they remain in the legal custody and control of the ministry/agency that created and transferred them to the storage facility. The ministry/agency is termed the "legal custodian" and retains responsibility for the records, including authorizations for access, until records are transferred to the custody of the BC Archives or destroyed.

In addition to single transfer accessions that cover a discrete body of records received from a single transferring agent in a single transfer, there are also multiple transfer accessions that are used for a related group of records transferred at different times. BC Archives may also assign "ongoing accession numbers" (OANs) to control transfers of records from series that are regularly transferred over time.

Before ARIS was instituted in 1991, various other accessioning systems were used, which continue to provide unique documentation of records in BC Archives holdings. These "legacy" systems include the Records Centre Services (RCS) accession registers, the photograph catalogue registers, and other legacy accession files.

Record types include correspondence, memoranda, forms, bound registers, file lists, card files, donation receipts, electronic records, and other types of records as indicated under relevant secondaries.

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

12410 ACCESSION CONTROL (continued)

transfer documentation received from the creating ministry or agency (ARS 011a, ARS 462a, and the file list) and the notifications of final disposition action (ARS 196, also known as “60 day notices”).

NOTE: Accession files may contain the following forms, some of which are produced on ARIS:

- ARS 011a/b (records transfer location list)
- ARS 168 (cancellation)
- ARS 189 (notification of removal for destruction)
- ARS 192 (notice of an ongoing accession no.)
- ARS 193 (discrepancy report re. boxes)
- ARS 194 (access authorization confirmation/ amendment)
- ARS 196 (60-day notice of final disposition action)
- ARS 199 (notice of storage location change)
- ARS 340b (container movement/removal form)
- ARS 389 (removal services – records for retention elsewhere)
- ARS 462a/b (FOI information box content list cover sheet)
- ARS 501 (removal services letter to storage co.)
- ARS 504 (management unit listing with creating agency information)
- ARS 514 (finding aids report – file/vol./item list)
- ARS 521 (discrepancy list)
- ARS 547 (notice of containers out on retrieval at time of disposition)

NOTE: Accession files are a case file series and should be classified as secondary "-20". Due to historical precedent, they are classified in the subject file range as secondary -02.

NOTE: Some file lists are not placed on accession files. Lengthy file lists are kept in off-site storage under ongoing accession 91-4043. File lists for records stored under “dummy accessions” are kept in finding aid development files in Belleville central files, under secondary 13050-30.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12410	<u>ACCESSION CONTROL</u> (continued)			
	NOTE: Future plans are to microfilm the accession files. In that event, the paper files would be reclassified to 12950-25 for scheduling purposes. The microfilm copy will remain scheduled under this secondary.			
-03	Access authorizations (includes ARS 194 forms [access authorization access authorization confirmation/ amendment] and confirmation and amendment correspondence)	CY+1y	nil	DE
	2y = sufficient time to update ARIS and to resolve discrepancies			
	NOTE: These records designate who is authorized to access records in off-site storage. They update the original access authorizations, which are documented in the appropriate accession file (secondary -02), and are used to update ARIS. Before 1998, the ARS 194 was filed under secondary -02 instead of here.			
-04	Legacy Records Centre Services accession registers	SO	nil	FR
	SO = upon conversion to ARIS and verification of the data			
	FR = BC Archives will fully retain legacy documentation of archival holdings. These records provide valuable information about the holdings and also about the history of management and access tools over time.			
	NOTE: These black and red bound volumes were used to log and track the assignment of accession numbers until 1991, when ARIS was implemented.			
	NOTE: Future plans are to microfilm the registers. In that event, the paper volumes would be reclassified to 12950-25 for scheduling purposes. The microfilm copy will remain scheduled under this secondary.			
-06	Ongoing accession number (OAN) assignment log (also known as the OAN register)	CY+1y	nil	DE
	2y = sufficient time to resolve discrepancies			

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12410	<u>ACCESSION CONTROL</u> (continued)			
	DE = The OAN assignment log can be destroyed because all OANs are documented in accession files and on ARIS.			
-07	Legacy photograph register (paper and electronic database) (arrange by number) (also known as the accession database [see ADI0307])	SO	nil	FR
	OPR = Access Services			
	FR = BC Archives will fully retain legacy documentation of archival holdings. These records provide valuable information about the holdings and also about the history of management and access tools over time.			
	NOTE: This register lists the numbers assigned to most photographs received before 1992. Created as an accessioning tool in the 1970s, the paper portion of the register is a set of 16 black binders. Entries are retroactive to cover previously undocumented photographs (many of which are available in the "General File" collection established in 1935).			
	Between 1988 and 1992, the register was kept as an electronic database instead of on paper. Retroactive entries with summary information for the earlier paper register were also added to the database. The original register (in binders and the discontinued database) is still needed to provide more detailed information than is recorded in the master inventory, and continues to be a unique source of information for many of the images.			
	Since 1992, ARIS has been used to document all accessions and this register has been discontinued. The register continues to be a unique source of information about many photographs, and is also used to resolve discrepancies with information on the BC Archives web site.			
-08	Records transfer reports (covers ARS 380 [transfers by courier] and ARS 381 [transfers by a records storage facility])	SO	6m	DE

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12410	<u>ACCESSION CONTROL</u> (continued)			
-30	Legacy accession files - all media (e.g., old sound and moving image accession files) (paper and electronic records)	SO	nil	FR

SO = upon destruction of all records contained within an accession, or cancellation of an accession, or deaccessioning, or upon conversion to the current accessioning process

FR = BC Archives will fully retain legacy documentation of archival holdings. These records provide valuable information about the holdings and also about the history of management and access tools over time.

NOTE: Legacy accession files that are converted to the current accessioning system are reclassified under secondary -02. See Appendix A for a complete list of legacy accession files.

NOTE: Future plans are to microfilm the legacy accession files. In that event, the paper files would be reclassified to 12950-25 for scheduling purposes. The microfilm copy will remain scheduled under this secondary.

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	A	SA	FD
12430	<u>DISPOSITION CONTROL</u>		
	Records relating to the control of the disposition of records kept in contracted and client agency storage facilities.		
	BC Archives manages the disposition process for records in off-site storage facilities, and is responsible for establishing government wide policy and standards relating to the disposition of records. Disposition of records includes destruction, selective or full retention by BC Archives, or permanent alienation from the Crown.		
	Ministries/agencies are responsible for arranging the physical destruction of records located on-site and not eligible for transfer to government-contracted storage facilities, according to standards set by BC Archives.		
	The Archives and Records Information System (ARIS) tracks the scheduling status of each container kept in off-site storage. Reports are run periodically to identify boxes/containers are eligible for final disposition. Final disposition is applied at the box level.		
	BC Archives notifies ministries and other bodies of the impending disposition of records by sending the records officer a 60-Day notice of final disposition action report (ARS 196). If the records officer does not contact BC Archives upon receipt of the notice, the records are disposed of in accordance with their scheduled final disposition.		
	Sometimes records eligible for scheduled final disposition are still required by the ministry or other body (e.g. for litigation or program review). In those cases, the ministry may request a "hold" to final disposition.		
	Record types include correspondence, memoranda, electronic records, forms, and registers.		
	For accession files see primary 12410. For ARIS, see Information System Overview section. For retrieval and use controls, see primaries 12570 to 12670.		
	Unless otherwise specified below, the ministry OPR (Records Centre Services) will retain these records for:		
	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		
	<u>SO</u>	<u>nil</u>	DE

(continued on next page)

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			<u>A</u>	<u>SA</u>	<u>FD</u>
12430	<u>DISPOSITION CONTROL</u> (continued)				
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Disposition status reports (paper and electronic records)		SO	nil	DE

NOTE: Disposition status reports include the following forms:

- ARS 457 (upcoming dispositions by storage location)
- ARS 458 (upcoming dispositions by current legal custodian [CLC])
- ARS 459 (completed dispositions by storage location)
- ARS 460 (completed dispositions by prior legal custodian)
- ARS 496 (upcoming destructions by CLC)
- ARS 497 (upcoming destructions by storage location)

NOTE: If the report is created as part of another file series, classify and schedule it under the relevant secondary.

-06	Legacy Records Centre Services disposition register		SO	nil	FR
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SO = upon completion of conversion to ARIS and verification of the data

FR = BC Archives will fully retain the legacy Records Centre Services disposition register because this documents the disposition of government records in accordance with the *Document Disposal Act*.

NOTE: These black and red bound volumes were used to log the disposition of accessioned records until 1991 when ARIS was implemented.

NOTE: Future plans are to microfilm the registers. In that event, the paper volumes would be reclassified to 12950-25 for scheduling purposes. The microfilm copy will remain scheduled under this secondary.

(continued on next page)

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	<u>A</u>	<u>SA</u>	<u>FD</u>	
12430	<u>DISPOSITION CONTROL</u> (continued)			
-07	Records destruction authorizations (includes notice of removal for destruction [ARS 189], cover letter to records storage facility [ARS 503], cover letter to destruction company [ARS 506], discrepancies listing [ARS 521], and other supporting documentation) (arrange by storage facility)	FY+1y	5y	DE
	NOTE: Classify the 60-day destruction notices that are sent to client agencies in the appropriate accession file under secondary 12410-02.			
-20	Unauthorized shredding, destruction or alienation (arrange by client)	CY+1y	4y	FR
	OPR = Yates central files			
	FR = BC Archives will fully retain records of unauthorized shredding, destruction or alienation of government records because they document the disposition of government records, and the government response to contraventions of the <i>Document Disposal Act</i> .			
	NOTE: These files must be cross-referenced to the appropriate 12410-02 accession file if one has been opened.			

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	<u>A</u>	<u>SA</u>	<u>FD</u>
12490 <u>FACILITIES AND SERVICES</u>			
Records relating to records storage, destruction and recycling facilities and services. BC Archives manages records storage, retrieval and destruction services for government records kept in contracted storage facilities, using the Archives and Records Information System (ARIS).			
Record types include correspondence, memoranda, circulars, prospectuses, electronic records, and reports.			
For ARIS, see the Information System Overview section. For contracts with destruction companies, see <i>ARCS</i> primary 1080.			
Unless otherwise specified below, the ministry OPR (Records Centre Services) will retain these records for:			
	CY+2y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:			
	<u>SO</u>	<u>nil</u>	DE
-00 Policy and procedures			
			- OPR SO 5y FR
			- <u>non-OPR</u> <u>SO</u> <u>nil</u> <u>DE</u>
-01 General			
-03 BC Buildings Corporation recycling services			
-04 Destruction and storage facilities and services (includes circulars, prospectuses, and annual reports) (arrange by company)			
-05 Location reports (ARS 450)	SO	nil	DE
NOTE: These reports list facilities where records are stored and are run on an ad hoc basis for ministries/agencies. If the report is created as part of another file series, classify and schedule it under the relevant secondary.			
-06 Proposed pick-up reports (ARS 453)	SO	nil	DE
-07 Storage location reports (ARS 456)	SO	nil	DE
NOTE: These reports are run each month for billing purposes. A copy of each report is filed with an invoice in the appropriate storage company contract file (secondary 12400-20).			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12630	<u>RETRIEVAL CONTROL – MICROFILM VAULT</u> (continued)			
-05	Microfilm vault retrieval form	SO+3m	nil	DE
	SO = when security microfilm is returned to the vault			
-06	Microfilm vault projects and plans (covers such projects as establishment of the vault and conversion of listings to ARIS)	SO	nil	SR
	OPR = Yates central files			
	SR = BC Archives will retain those microfilm vault projects and plans files that document significant milestones in the history of the vault (e.g., establishment of the vault, ARIS conversion). All other files covered by this secondary will be destroyed.			

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	<u>A</u>		<u>SA</u>		<u>FD</u>
12670		<u>RETRIEVAL CONTROL - STORAGE FACILITY</u>			
		Records relating to physical retrieval and use controls for archival holdings and client records in off-site storage which are retrieved for appraisal, scheduling and reference purposes.			
		Record types include correspondence, memoranda, logs and registers.			
		For accession control, see primary 12410.			
		For call slips used in reference requests, see secondary 15480-07.			
		For disposition control, see primary 12430.			
		For microfilm vault retrieval control, see primary 12630.			
		Unless otherwise specified below, the ministry OPR (Records Centre Services [RCS], Access Services) will retain these records for:	CY+2y	nil	DE
		Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
	-00	Policy and procedures	SO	5y	FR
		- OPR			
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01	General			
	-06	Retrieval and return request forms	CY+1y	8y	DE
	-07	Way bills for box retrieval and return	CY+1y	8y	DE
		10y = The ten-year retention period for retrieval and return request forms and way bills provides sufficient time to discover that a box is missing.			
		NOTE: Retrieval and request forms and way bills contain the signatures of the shipper and receiver (and also document which client or staff member had access to the box). If a box goes missing they are used to determine whether or not the box was retrieved and returned.			
		NOTE: RCS retrieval control files contain the following forms: ARS 531 (RCS/RSF retrieval request) and ARS 532 (RCS/RSF Retrieval Request). RSF stands for records storage facility.			

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

12700 CLASSIFICATION AND SCHEDULE DESIGN - GENERAL

Records relating to the design, review, and amendment of integrated records classification and scheduling systems not shown elsewhere in this primary block.

A classification system identifies and describes the records of an organization or program, organizing them into a structure that reflects their functions and facilitates filing and retrieval. A records scheduling system is a timetable governing the life span of records from their creation, through active use within an office, retention in off-site storage, to disposition (destruction or preservation in the archives). The integrated system used by the BC Government combines classification and scheduling so that its records can be managed efficiently.

The BC Government integrated system covers both administrative and operational records and is commonly known as “*ARCS* and *ORCS*”. *ARCS*, or the *Administrative Records Classification System*, is the system for the administrative records common throughout government. An *Operational Records Classification System (ORCS)* covers records that relate to the unique operations and services of one government program, ministry or agency.

Other types of records schedules are developed for records not covered by *ARCS* and *ORCS*. ‘Special Schedules’ cover specific categories of records created government-wide, such as executive records, Commission of Inquiry records, and transitory records. An ongoing records schedule (ORS) may be developed to cover one or more series of operational records of a program that is either too small to warrant an *ORCS*, or does not yet have one. A one-time schedule is developed for a specific set of records not covered by any existing schedule.

BC Archives is responsible for developing and amending *ARCS*, special schedules, and one-time schedules as appropriate. Ministries and agencies are responsible for developing *ORCS* and ongoing records schedules to reflect their own programs.

The *Document Disposal Act* establishes approval requirements for the retention and disposition of records and recorded information. BC Archives is the central agency responsible for managing this process. The Ministry/agency records officer is responsible for developing *ORCS* and liaising with BC Archives.

(continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

		<u>A</u>	<u>SA</u>	<u>FD</u>
12700	<u>CLASSIFICATION AND SCHEDULE DESIGN - GENERAL</u> (continued)			
	<p>The standards for <i>ORCS</i> are documented in the <i>Standard ORCS Kit</i> that is used by ministries/agencies when drafting their individual scheduling systems. BC Archives maintains the government-wide <i>ARCS</i> in accordance with the same standards.</p> <p>The review and approval process for each <i>ORCS</i> involves several stages. There is an internal review by the appropriate ministry/ agency personnel to ensure that the system meets the requirements of the organization it is designed to serve. Then the <i>ORCS</i> is submitted to BC Archives, where it is reviewed to ensure compliance with content and formatting standards, and to identify records with evidential and historical value, ensuring that they are preserved for the BC Archives (known as the archival appraisal process).</p> <p>The review and approval process is documented on the records retention and disposition authority form (ARS 008). The form is signed off, indicating endorsement of the draft <i>ORCS</i>, by representatives of the following: BC Archives, the ministry/agency, the Public Documents Committee (PDC), the Select Standing Committee on Public Accounts (also known as the Public Accounts Committee or PAC), and finally the Legislative Assembly. After receiving legislative approval, the schedule becomes a legal document and, if it is an <i>ORCS</i>, is published by the BC Archives.</p> <p>Record types include correspondence and memoranda.</p> <p>For appraisal of scheduled records, see primary 12830. For the ARS 008 form, see secondary 12830-03. For the development and approval of one-time records schedules, see secondary 12830-03. For the PAC, see <i>ARCS</i> primary 201. For the PDC, see secondary 12830-07. For the <i>Standard ORCS Kit</i>, see secondary 11370-03.</p> <p>Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:</p>			
		CY+2y	nil	DE
	<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>			
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR - <u>non-OPR</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

12720 CLASSIFICATION AND SCHEDULE DESIGN - ARCS

Records relating to the design, development, review, and amendment of the *Administrative Records Classification System (ARCS)*. *ARCS* is a combined records classification and scheduling system that facilitates the efficient and systematic organization, retrieval, storage, and destruction or permanent retention of the government's administrative records. Administrative records are those common throughout government, that is records relating to the management of facilities, property, materiel, finance, personnel, and information systems. *ARCS* is maintained by the BC Archives and is the standard government-wide classification system for all administrative records of the Government of British Columbia.

ARCS was first approved in 1987, and is amended on a regular basis. Since 1997 It has been maintained in electronic form, as *ARCS Online*, rather than as a published paper document (see <http://www.bcarchives.gov.bc.ca/ARCS/index.htm>).

Records officers submit requests for amendments to the BC Archives, which reviews them in consultation with the *ARCS* Review Committee. The committee consists of records officers and BC Archives staff appointed by the BC Archives, and is chaired by a member of BC Archives staff. BC Archives staff develop amendment packages and submit them to the Public Documents Committee (PDC) following the same procedure as for other schedule approval requests.

ARCS is approved for use by all government ministries. In accordance with approved schedule 135311, agencies, boards and commissions must apply for BC Archives permission to use *ARCS*, submitting a list of secondaries which do not apply, and/or a schedule amendment proposal. BC Archives issues a letter of authorization, and adds the agency name to the list of authorized *ARCS* agencies.

Record types include correspondence, memoranda, draft *ARCS* amendments, draft revisions of the generic introductory sections and appendices, records inventories, research notes, sample documents and forms, and organization charts.

NOTE: Each *ARCS* amendment approved by the Legislative Assembly must be retained. Upon approval, file a complete copy of the *ARCS* amendment on the schedule application file for the amendment (secondary 12830-03).

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

		<u>A</u>	<u>SA</u>	<u>FD</u>
12720	<u>CLASSIFICATION AND SCHEDULE DESIGN - ARCS</u> (continued)			
	For appraisal projects relating to <i>ARCS</i> , see secondary 12800-10. For approved <i>ARCS</i> and <i>ARCS</i> amendments, see secondary 12830-03. For <i>ARCS</i> advice given to clients, see primary 11860. For the <i>ARCS</i> Review Committee, see <i>ARCS</i> secondary 204-20. For authorizations to apply <i>ARCS</i> to agencies, boards and commissions, see secondary 12830-03, schedule 135311. For the interpretation of <i>ARCS</i> , see primary 11860. For the PDC, see secondary 12830-07. For reviews of clients' implementation of <i>ARCS</i> , see primary 11860.			
	Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures			
	- OPR	<u>SO</u>	5y	FR
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-02	<i>ARCS</i> Review Committee decision records (includes agendas, records of decisions, and supporting documentation)	SO	7y	FR
	SO = when corresponding committee file, classified under <i>ARCS</i> secondary 204-20, has been closed for one year			
	FR = BC Archives will fully retain <i>ARCS</i> Review Committee decision records because they document the decisions of an inter-ministerial committee responsible for providing recommendations for amendments to a government-wide records management manual.			
	NOTE: All the records of the <i>ARCS</i> Review Committee for 1990-1998, previously classified as 204-20/ <i>ARCS</i> , volumes 1-5, are classified here and fully retained. They document early <i>ARCS</i> development and amendment in considerable detail. Since 1999, committee deliberations are adequately documented in the decision records classified here, as well as in the <i>ARCS</i> amendment packages classified under secondary 12720-02.			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

		<u>A</u>	<u>SA</u>	<u>FD</u>
12720	<u>CLASSIFICATION AND SCHEDULE DESIGN - ARCS</u> (continued)			
-03	ARCS amendment request tracking list	SO	nil	DE
-05	ARCS <i>Online</i> maintenance files (arrange by section, primary, subject or function, whichever is appropriate) (covers records relating to the maintenance and update of all formats of <i>ARCS Online</i> [including HTML and PDF formats])	SO	nil	DE
	SO = when update is complete and verified			
-20	ARCS amendment packages (arrange by amendment) (covers draft copies of significant revisions and amendment summary documents, archival appraisal summaries, briefing notes, and pre-2002 <i>ARCS</i> development and history documentation)	SO	5y	FR
	SO = upon legislative approval and publication of the <i>ARCS</i> amendment			
	FR = BC Archives will fully retain <i>ARCS</i> amendment packages because they document, in summary form, the development of an integrated records classification and scheduling system used throughout government.			
	NOTE: Amendment summaries are made available to clients on <i>ARCS Online</i> .			
-30	ARCS development and amendment files (includes working notes and correspondence) (arrange by section, primary, subject or function, whichever is appropriate)	SO	5y	DE
	DE = These records will be destroyed because the essential documentation of the development and amendment of <i>ARCS</i> is documented in <i>ARCS</i> amendment packages (secondary 12720-20).			

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

12760 CLASSIFICATION AND SCHEDULE DESIGN - ORCS

Records relating to the design, development, review, and amendment, of operational records classification and scheduling systems (*ORCS*).

ORCS is the government-wide standard for classification and scheduling, designed to facilitate the efficient and systematic organization, retrieval, storage, and destruction or permanent retention of the government's operational records.

Each ministry or agency is responsible for developing and implementing its own *ORCS*, in accordance with BC Archives standards, as outlined in the *Standard ORCS Kit*. BC Archives reviews each *ORCS* for compliance with *ORCS* standards and conventions, and to identify records with evidential and historical value for preservation in the Archives (this work is termed "archival appraisal").

BC Archives also guides the *ORCS* through the formal approval process (described in the scope note for primary 12700) and arranges for publication of the *ORCS* after it receives legislative approval.

The *ORCS* review and approval process is tracked on the Archives and Records Information System (ARIS).

Record types include correspondence, memoranda, draft *ORCS* and amendments, records inventories, research materials and notes, sample documents and forms, listings of *ORCS* number assignments, organization charts, briefing notes, and copies of legislation.

NOTE: It is essential that each draft *ORCS* approved by the Legislative Assembly be retained. Upon approval, file a complete copy of the *ORCS* on the schedule authorization file (secondary 12830-03). The *ORCS* will be reprinted with "approved" headers and footers, catalogued, published, and distributed.

For approved *ORCS* and amendments, see secondary 12830-03.

For the *Standard ORCS Kit*, see secondary 11370-03.

For ARIS, see Information System Overview section.

For *ORCS* advice given to clients, see primary 11860.

For publication of *ORCS* and a list of approved *ORCS*, see ARCS primary 308.

For reviews of clients' implementation of *ORCS*, see primary 11860.

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OPR =	Office of Primary Responsibility			VR =	Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

			<u>A</u>	<u>SA</u>	<u>FD</u>
12760	<u>CLASSIFICATION AND SCHEDULE DESIGN – ORCS</u> (continued)				
	Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
-01	General	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-20	<i>ORCS</i> development, review and amendment files (arrange by title of <i>ORCS</i>)		SO	5y	FR
	SO = when replaced by a major amendment or when <i>ORCS</i> is cancelled **Administrative amendment 2004/06/28				
	FR = BC Archives will fully retain <i>ORCS</i> development, review and amendment files as they document the development, evolution, review, and analysis of integrated records classification and scheduling systems that reflect the operational functions and records-keeping practices of the BC Government, as well as the archival appraisal of records covered by these systems.				
	NOTE: Each file contains a copy of each significant revision to an <i>ORCS</i> .				
	NOTE: Archival appraisal notes, including working notes, lists of appraisal statements, series/function tables, and related correspondence are placed on a separate file-back within the file. Preliminary description notes may also be temporarily filed here, although these are removed to the appropriate finding aid development file (secondary 13050-30) when a description is created.				
-30	Documentation of retained system files (includes manuals, user guides, and other relevant documentation relating to the system) (arrange by system title)		SO	nil	FR

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

12760 CLASSIFICATION AND SCHEDULE DESIGN – ORCS (continued)

FR = BC Archives will fully retain documentation of retained system files because they provide essential technical and descriptive information about archival holdings, necessary to support their ongoing maintenance in the electronic archives.

NOTE: This secondary covers documentation required for systems appraised for full or selective retention by the BC Archives, to supplement the ISO information.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

			A	SA	FD
12790	<u>CLASSIFICATION AND SCHEDULE DESIGN - SPECIAL SCHEDULES</u>				
	Records relating to the design, development, review, and amendment of special ongoing records schedules which apply to records on a government-wide basis.				
	Some types of records can be scheduled for retention and disposition in broad categories which may be used by all ministries and agencies. Several of the special schedules cover routine, transitory, and ephemeral records or data which serve no ongoing purpose. In addition, special schedules also cover executive records, commission of inquiry records, Year 2000 (Y2K) project documentation, record copies of published maps, and information stored on special media, such as videotape, optical disk, paintings, maps, plans, photographs, and other sound, film, video, photographic or cartographic media.				
	These schedules are not part of ARCS, but are included in the ARCS On-Line manual for reference convenience, located at: http://www.bcarchives.gov.bc.ca/ARCS/index.htm .				
	Record types include correspondence, memoranda, draft schedules, research notes, records inventories, sample documents and forms, and organization charts.				
	For advice given to clients, see primary 11860. For approved schedules and amendments, see secondary 12830-03. For reviews of clients' implementation of schedules, see primary 11860.				
	Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
-01	General	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-20	Special schedule development files (arrange by subject of proposed schedule) (covers development, review and amendment of special government-wide ongoing records schedules)		SO	5y	FR

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

12790 CLASSIFICATION AND SCHEDULE DESIGN - SPECIAL SCHEDULES (continued)

SO = upon legislative approval and publication of the special schedule, or when there has been no activity relating to the schedule development project for two years

FR = BC Archives will fully retain special schedule development files as they document the development, evolution, review, and analysis of government-wide records schedules covering special categories of records, as well as the archival appraisal of these records.

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

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

A SA FD

12800 APPRAISAL AND ACQUISITION - GENERAL

Records relating to the appraisal, selection and acquisition of government and non-government records not shown elsewhere in this primary block.

Archival appraisal is the process of identifying records with sufficient evidential and historical values to warrant preservation in an archives, in accordance with accepted archival theory. In the BC Government, archival appraisal is mainly conducted in the context of review of records classification systems and other types of records schedules.

In cases where the archival appraisal decision is to retain some but not all of a group of records, appraisal involves a second step known as "archival selection". Archival selection is the process of choosing specific records for preservation in the archives, usually in accordance with specific criteria. Records may be selected for preservation in the archives because they are representative (i.e., typical of the records covered by a secondary) or because they are significant (i.e., they document cases or topics that reflect important actions, decisions or occurrences).

Acquisition is the process whereby archival holdings are transferred, donated, deposited or purchased. The BC Archives acquires BC Government records by transferring those records appraised and selected under the records scheduling system managed by the BC Archives. The BC Archives also acquires records from other organizations, families, and individuals, as well as other governments, mainly as donations, but sometimes as purchases.

For analyses of records classification and scheduling systems, see primary block 12700-12790.

For Archives and Records Information System (ARIS), see the Information System Overview section.

Record types include forms, reports, correspondence and memoranda.

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

CY+2y nil DE

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

SO nil DE

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

			<u>A</u>	<u>SA</u>	<u>FD</u>
12800	<u>APPRAISAL AND ACQUISITION - GENERAL</u> (continued)				
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Unprocessed records status reports		SO	nil	DE

SO = upon generation of new report

NOTE: Unprocessed records status reports include the following forms, all produced from ARIS:

- ARS 449 (list of outstanding applications)
- ARS 451 (non-government records acquisition reports)
- ARS 453 (selection review reports)
- ARS 460 (completed disposition reports)
- ARS 509 (records retention and disposal authorities out to client)

NOTE: If the report is created as part of another file series, classify and schedule it under the relevant secondary.

-10	Appraisal and selection projects (arrange by project name) (covers projects such as the Expo Records Project, the Initial Selection Process and Closure Week Executive Records Project)		SO	5y	FR
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FR = BC Archives will fully retain appraisal and selection project records because they document a variety of initiatives to address a key decision-making process in archival work.

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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A SA FD

12830 APPRAISAL AND ACQUISITION – SCHEDULE AUTHORIZATION

Records relating to the authorization process for appraisal, selection, and disposition (destruction or acquisition) of government and non-government records.

For government records, schedule application files document the drafting, review, approval, and amendment of all records retention and disposition authorities (ARS 008 form). A schedule application file exists for each ARS 008, regardless of whether or not the records it describes are covered by the *Document Disposal Act*. For more information about records schedules and the review and approval process for them, see the scope note for primary 12700.

Schedule application files also cover the application of approved schedules to specific records. For each records accession transferred to storage, the ministry/agency sends a form requesting authority to apply an approved schedule (ARS 517a/b) or one requesting that a draft schedule be applied once approved (ARS 118). BC Archives applies the approved schedule, entering this information into the Archives and Records Information System (ARIS) and producing a client authority to apply schedule form (ARS 130). A copy of this form is sent to the ministry/agency, and when the records are ready for disposition, a 60-day notice (ARS 196) is generated by ARIS and sent to the ministry/agency. The ministry/agency records officer may request that a “hold” be placed on the records to delay disposition.

For non-government records, the authorization process for acquiring the records is somewhat different. BC Archives corresponds with the potential donor and documents the donation transaction and the nature of the records on a record of gift form (for which there is no form number). An acquisition recommendation is made (ARS 215, an ARIS report). If an income tax appraisal is conducted, this is documented with a tax appraisal form (ARS 072).

This primary also covers transfer of archival records removed from the custody of the BC Archives. In some cases, the records are given to other archival repositories in response to permanent transfer requests. In other cases they are re-appraised, determined to have insufficient value to warrant preservation, and deaccessioned.

Record types include correspondence, memoranda, and research notes, and other records as indicated under relevant secondaries.

(continued on next page)

A =	Active	CY =	Calendar Year	SO =	Superseded or Obsolete
SA =	Semi-active	FY =	Fiscal Year	DE =	Destruction
FD =	Final Disposition	NA =	Not Applicable	SR =	Selective Retention
PIB =	Personal Information Bank	w =	week m = month	FR =	Full Retention
PUR =	Public Use Records	y =	year	FOI =	Freedom of Information/Privacy
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	<u>A</u>	<u>SA</u>	<u>FD</u>
12830 <u>APPRAISAL AND ACQUISITION - SCHEDULE AUTHORIZATION</u> (continued)			
For accession files covering records to which the schedules are applied, see secondary 12410-02. For additional documentation of tax appraisals, see primary 12900. For ARIS, see the Information System Overview section. For the holdings of BC Archives, see primary 12950.			
Unless otherwise specified below, the ministry OPR (Records Centre Services) will retain these records for:			
	CY+2y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:			
	<u>SO</u>	<u>nil</u>	<u>DE</u>
-00 Policy and procedures			
			- OPR
	<u>SO</u>	5y	FR
			- <u>non-OPR</u>
	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01 General			
-02 ARIS schedule and application reports	SO	nil	DE
SO = upon generation of new report			
NOTE: ARIS schedule and application reports include the following forms:			
<ul style="list-style-type: none"> • ARS 168 (notice of records services application) • ARS 200 (approval of schedule/amendment) • ARS 448 (ARIS application reports) • ARS 452 (ARIS records schedules) • ARS 509 (records retention and disposal authorities out to client) • ARS 510 (continuing schedule authority reviews) • ARS 526 (outstanding schedule authorities) 			
NOTE: If the report is created as part of another file series, classify and schedule it under the relevant secondary.			
-03 Schedule application files (includes correspondence and forms) (arrange by application/schedule number)	SO	nil	FR
OPR = Records Centre Services for all files except those covering non-government records (with accession numbers in the 700,000 – 800,000), which are stored in Belleville central filing (3 rd floor stacks).			
(continued on next page)			

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A SA FD

12830 APPRAISAL AND ACQUISITION - SCHEDULE AUTHORIZATION
(continued)

SO = upon destruction of all records covered by a schedule application, cancellation of a-schedule, or deaccessioning (removal of records from archival custody)

FR = BC Archives will fully retain schedule application files because they document decisions made about the retention and disposition of government records and donated non-government records, and the reasoning behind these decisions. These records also provide valuable information about archival holdings.

NOTE Schedule application files may contain the following forms and other types of records:

- ARS 008 (records retention and disposition authority forms)
- ARS 118 (records services applications)
- ARS 130 (authorities to apply schedules)
- ARS 215 (acquisition recommendation forms for non-government records)
- ARS 368 (selection decision records)
- ARS 375 (approved ARS 130 form memo checklist)
- ARS 400 (executive records questionnaire)
- approved records schedules (*ORCS* and other ongoing records schedules)
- ARS 517 (requests for schedules to be applied)
- record of gift forms for non-government records
- receipts for non-government records
- records inventory lists
- screen prints showing relevant ARIS schedule tracking table updates

NOTE: Schedule numbers are assigned automatically by ARIS. Before 1991, numbers were assigned and documented using the Retention and Disposition Schedule Register (secondary -19). Until 1990 the first two digits of most schedule numbers indicated the year the number was assigned. The exception to this is the 700,000-800,000 block used for non-DDA records.

(continued on next page)

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A SA FD

12830 APPRAISAL AND ACQUISITION – SCHEDULE AUTHORIZATION
(continued)

NOTE: The following ARIS tables track schedule applications: “maintain existing applications”, “maintain existing schedule trackings”, “maintain existing schedule authorities”, and “maintain acquisition authorities”. These records are classified under the secondary for ARIS (11000-20).

NOTE: The current schedule application numbering system was established in 1984 (starting with 84-0424), but was applied retroactively to 1981 (schedules 84-0001 to 84-0423). Records disposition applications for 1955-1980 are filed by year, and consist of forms and correspondence. The forms, known as “PDC A/B forms”, were the precursors of the ARS 008; the “A” form covered applications for authorization to destroy records before they were seven years old, and the “B” form covered records more than seven years old. Pre-1955 records disposition applications are documented in PDC Committee files classified under secondary -07.

NOTE: Schedule application files are a case file series and should be classified as secondary "-20". Due to historical precedent, they are classified in the subject file range as secondary "-02".

NOTE: Future plans are to microfilm the accession files. In that event, the paper files will be reclassified to 12950-25 for scheduling purposes. The microfilm copy will remain scheduled under this secondary.

FOI: Some schedule application files relating to donations of non-government records contain personal information about donors (names, addresses, annual income information provided for tax receipt purposes).

-04	Permanent transfer requests (arrange by name of archival repository) (also known as “alienation requests”)	SO	nil	FR
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OPR = Belleville central files

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12830	<u>APPRAISAL AND ACQUISITION – SCHEDULE AUTHORIZATION</u> (continued)			
	FR = BC Archives will fully retain permanent transfer requests because they comprise the main documentation of requests and decisions about transferring certain archival holdings to other archival repositories.			
	NOTE: This secondary documents archival holdings being considered for permanent transfer to another archival repository, as well as those that have been permanently transferred. Copies of these records are also classified on the appropriate schedule application file (secondary -03).			
	NOTE: Records transferred to other archival repositories are documented on ARIS with reference to the previous classification number for this secondary (12895-20).			
-05	Superseded government-wide records schedules (includes signed records schedule retention and disposal authority forms [ARS 008] and copies of some of the approved schedules) (arrange by year, then by schedule number)	SO	nil	FR
	OPR = Yates central files			
	SO = when the records covered by this secondary have been microfilmed			
	FR = BC Archives will fully retain superseded government-wide records schedules because they document past decisions about the retention and disposition of records, and the evolution of records classification and scheduling in the BC Government.			
	NOTE: The approved schedules are classified under secondary -03.			
	NOTE: This secondary covers the approval of early ongoing records schedules such as the first edition of the <i>Administrative Records Classification System</i> , the <i>Transitory Records Schedule</i> , and the <i>Executive</i>			

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12830	<u>APPRAISAL AND ACQUISITION – SCHEDULE AUTHORIZATION</u> (continued)			
	<i>Records Schedule</i> , all of which were signed-off by every deputy minister. Since 1989/90, the only deputy minister to sign off government-wide ongoing-records schedules is the one responsible for the government's records management program.			
-06	Orders in council (OIC) for one-time schedules (includes OICs and attached schedules, and correspondence)	SO	nil	FR
	OPR = Belleville central files (Provincial Archivist's office)			
	NOTE: Under the provisions of the <i>DDA</i> , schedules covering records more than 7 years old may be approved by Executive Council using an OIC rather than by the Legislative Assembly.			
	FR = The BC Archives will fully retain OICs for one-time schedules because they document the history of authorizations to dispose of government records more than seven years old.			
-07	Public Documents Committee records (covers minutes, presentation notes, and ARS 442 [PDC attachment report], an ARIS report)	SO	7y	FR
	OPR= Belleville central files (Provincial Archivist's office)			
	NOTE: These records were previously classified under <i>ARCS</i> 204-20, but have been moved to the <i>ORCS</i> because a different final disposition is required.			
	FR = BC Archives will fully retain the records of the PDC because they document the deliberations of an inter-ministerial body that makes expert, high-level decisions about the disposition of government records.			
-08	Legacy deaccessioned records documentation (covers documentation of records that are re-appraised and deaccessioned)	CY+2y	5y	FR
	OPR= Belleville central files (continued on next page)			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12830	<u>APPRAISAL AND ACQUISITION – SCHEDULE AUTHORIZATION</u> (continued)			
	8y = for reference purposes			
	FR = BC Archives will fully retain legacy deaccessioned records documentation because it documents the removal of items from archival holdings and the decisions to remove them, and to destroy or otherwise dispose of them.			
	NOTE: Secondary -08 covers pre-1991 methods of documenting the reappraisal and deaccessioning of non-government records; see Appendix A for a list of these. This function is continued by schedule application files classified under secondary 12830-03. Do not open new files under this secondary.			
-14	Legacy donor files (includes receipts issued to donors [these are not taxation receipts], copies of correspondence and non-numbered record of gift forms)	SO	nil	FR
	OPR = Belleville central files			
	FR = BC Archives will fully retain legacy donor files for their legal, evidential and historical values. They document the acquisition of non-government records prior to approximately 1992.			
	NOTE: Donor documentation has varied over time and according to records media, and much of it exists within correspondence files dating back as far as 1910 (see Appendix A, ADI 101, 040, 055-058, and 312-316). Since 1992, most private donations have been documented under secondary 12830-03, in the 700,000 block of files. Also see secondary 12830-17 for offers of archival donations.			
	NOTE: Do not open new files under this secondary.			
	NOTE: This secondary also covers donations of copies, whereby the owner of the records retained the originals.			

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12830	<u>APPRAISAL AND ACQUISITION – SCHEDULE AUTHORIZATION</u> (continued)			
-17	Offers of archival donations (covers offers of both government and non-government archival records) OPR = Belleville central files SO = When the decision is made to acquire the records, documentation is moved to the appropriate schedule application file (secondary 12830-03). When the decision is made not to acquire the records, the file is closed. NOTE: Until 2002, these records were filed under secondary 12820-01.	SO+1y	nil	DE
-19	Legacy schedule tracking registers (covers the volumes known as the DDA registers and the PABC document disposal applications registers) SO = upon completion of conversion to ARIS and verification of the data FR = BC Archives will fully retain legacy schedule tracking registers because they document the records scheduling process, whereby decisions were made about the retention and disposition of government records, in the early days of a formal records management program for the BC Government (1984-1991). NOTE: The Retention and Disposition Schedule Register (also known as the DDA register) takes the form of 13 black and red bound volumes. They were used by Records Centre Services to log and track the assignment of application numbers from 1984 until 1991, when ARIS was implemented. See Appendix A, ADI0610 – ADI0627 for further information about this and other legacy registers.	SO	nil	FR

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	A	SA	FD																														
12900	<u>APPRAISAL AND ACQUISITION – MONETARY EVALUATION</u>																																
<p>Records relating to the monetary evaluation of archival and library holdings. The majority of the evaluations are for taxation purposes of non-government records that have been donated to the BC Archives. Depending on the value of the donation, it is appraised by representatives from the National Archival Appraisal Board (NAAB), by a private dealer, or by a BC Archives archivist. A numbered income tax receipt is issued to the donor. If the donation qualifies as cultural property for income tax purposes, the Canadian Cultural Property Export Review Board (CCPERB) also appraises the donation and issues a certificate of cultural property to the donor.</p> <p>Record types include correspondence, memoranda, notices, blank application forms and other types of records as indicated under relevant secondaries.</p> <p>For additional records of monetary evaluation of holdings, see secondary 12410-30 (legacy accession files), secondary 12830-03 (schedule application files), and 13900-20 (Preservation Database; contains monetary evaluation documentation for specific items in the library holdings and in paintings, drawings, and prints holdings)</p> <p>For records of the archival appraisal and acquisition of non-government records, see secondary 12830-03.</p> <p>Unless otherwise specified below, the ministry OPR (Belleville central files) will retain these records for:</p> <p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p> <table border="0"> <tr> <td>-00</td> <td>Policy and procedures</td> <td>- OPR</td> <td>SO</td> <td>5y</td> <td>FR</td> </tr> <tr> <td></td> <td></td> <td>- <u>non-OPR</u></td> <td><u>SO</u></td> <td><u>nil</u></td> <td><u>DE</u></td> </tr> <tr> <td>-01</td> <td>General</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>-02</td> <td>CCPERB policies and guidelines (Canadian Cultural Property Export Review Board)</td> <td></td> <td>SO</td> <td>nil</td> <td>DE</td> </tr> <tr> <td>-03</td> <td>CCPERB deadline notices</td> <td></td> <td>SO</td> <td>nil</td> <td>DE</td> </tr> </table> <p>SO = when the deadline expires</p>				-00	Policy and procedures	- OPR	SO	5y	FR			- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>	-01	General					-02	CCPERB policies and guidelines (Canadian Cultural Property Export Review Board)		SO	nil	DE	-03	CCPERB deadline notices		SO	nil	DE
-00	Policy and procedures	- OPR	SO	5y	FR																												
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>																												
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-02	CCPERB policies and guidelines (Canadian Cultural Property Export Review Board)		SO	nil	DE																												
-03	CCPERB deadline notices		SO	nil	DE																												
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		<u>A</u>	<u>SA</u>	<u>FD</u>
12900	<u>APPRAISAL AND ACQUISITION – MONETARY EVALUATION</u> (continued)			
-06	CCPERB notification of delay periods	SO	nil	DE
-07	National Archival Appraisal Board	SO	nil	DE
-10	Professional organizations and dealers (covers organizations other than NAAB that have provided appraisal services)	SO	nil	DE
-12	Tax Appraisal forms register (a register listing all forms that have been used, including those incorrectly completed and destroyed)	SO	nil	FR
	FR = BC Archives will fully retain the tax appraisal forms register because it indexes the taxation appraisal and certification files (secondary -20).			
	NOTE: The tax appraisal forms register and blank forms are maintained in the BC Archives vault.			
-20	Taxation appraisal and certification files (includes correspondence, certification application forms, yellow copies of BC Archives numbered charitable tax receipts [also known as record of gift forms], and taxation appraisal reports) (arrange by year, and where appropriate, by organization [i.e., NAAB or CCPERB])	CY+10y	nil	FR
	10y = satisfies CCPERB requirements			
	FR = BC Archives will fully retain these records because they document the acquisition and monetary evaluation of non-government archival holdings. These records have ongoing legal and evidential value.			
	NOTE: Information about the tax appraisal of a particular accession can be found by checking the tax receipt date on ARIS or in the relevant schedule application file (secondary 12830-03), and then reviewing the taxation appraisal and certification file(s) for the appropriate year.			

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	<u>A</u>	<u>SA</u>	<u>FD</u>																																								
12950 <u>ARCHIVAL HOLDINGS</u>																																											
<p>This primary covers the archival records holdings of the Province of British Columbia, and exists for administrative purposes only. These holdings are managed by the BC Archives and consist of archival records in all media (e.g., drawings, electronic records, maps and plans, moving images, paintings, photographs, sound recordings, and textual [paper] records) and in a wide variety of physical formats (e.g., compact discs, electronic databases, electronic records [including web sites], paper, microfilm, videotape). In addition, this primary covers library holdings of the BC Archives (covered by the definition of government records in the <i>Interpretation Act</i> [RSBC 1996, c. 238, s. 29]).</p> <p>Record types include correspondence and memoranda, and archival holdings in all media.</p> <p>For access tools that describe the archival holdings, see primary 13050.</p> <p>For acquisition of archival holdings, see primary 12830.</p> <p>For Archives and Records Information System (ARIS), see the Information System Overview section.</p> <p>For records relating to archival holdings placed on extended loan, see primary 15140.</p> <p>Unless otherwise specified below, the ministry OPR (BC Archives) will retain these records for:</p> <table border="0"> <tr> <td></td> <td></td> <td align="center">CY+2y</td> <td align="center">nil</td> <td align="center">DE</td> </tr> </table> <p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p> <table border="0"> <tr> <td></td> <td></td> <td align="center"><u>SO</u></td> <td align="center"><u>nil</u></td> <td align="center">DE</td> </tr> </table> <table border="0"> <tr> <td>-00</td> <td>Policy and procedures</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td align="center">- OPR</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td align="center">- <u>non-OPR</u></td> </tr> <tr> <td></td> <td></td> <td align="center"><u>SO</u></td> <td align="center">5y</td> <td align="center">FR</td> </tr> <tr> <td>-01</td> <td>General</td> <td align="center"><u>SO</u></td> <td align="center"><u>nil</u></td> <td align="center"><u>DE</u></td> </tr> <tr> <td>-20</td> <td>Archival holdings of the BC Archives</td> <td align="center">NA</td> <td align="center">NA</td> <td align="center">FR</td> </tr> </table> <p>NA = see relevant records schedule</p>						CY+2y	nil	DE			<u>SO</u>	<u>nil</u>	DE	-00	Policy and procedures								- OPR					- <u>non-OPR</u>			<u>SO</u>	5y	FR	-01	General	<u>SO</u>	<u>nil</u>	<u>DE</u>	-20	Archival holdings of the BC Archives	NA	NA	FR
		CY+2y	nil	DE																																							
		<u>SO</u>	<u>nil</u>	DE																																							
-00	Policy and procedures																																										
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				- <u>non-OPR</u>																																							
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-01	General	<u>SO</u>	<u>nil</u>	<u>DE</u>																																							
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	<u>A</u>	<u>SA</u>	<u>FD</u>	
12950	<u>ARCHIVAL HOLDINGS</u> (continued)			
	NOTE: Records relating to the decision to microfilm, file lists, and other records of the microfilming process are classified and scheduled in the appropriate accession (12410-02) or schedule application (12830-03) file.			
-30	Reappraised and deaccessioned records (does not cover records transferred to another archival repository, which are classified under secondary -40)	NA	NA	DE
	NA = Records are reclassified under this secondary from secondary 12950-20. These are records that have already been transferred by the original creating agencies to the Archives at some time in the past, so the active and semi-active periods are irrelevant.			
	NOTE: BC Archives will store reappraised and deaccessioned records (pending their destruction) under ongoing RCS accession number 91-0360.			
	NOTE: Classify records relating to the transfer process under the appropriate schedule application file (secondary 12830-03) and accession file (secondary 12410-02), as well as under permanent transfer requests (secondary 12830-04).			
	NOTE :Pre-1991 reappraisal and deaccessioning records are classified under secondary 12830-08.			
-40	Transferred records	SO	NA	NA
	SO = upon transfer to another archival repository			
	NA = when the records are transferred, they are no longer property of the BC Government and no longer covered by its records schedules.			
	NOTE: Records relating to the transfer of the archival records (requests for transfer, agreements, and inventories) are classified under secondary 12830-04. Copies of these records are also classified and scheduled in the appropriate accession file under secondary 12410-02.			

(continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
12950	<u>ARCHIVAL HOLDINGS</u> (continued)			
-50	Library holdings (includes the North West Collection, the sheet music collection, the performing arts program collection, newspapers, and historical atlases)	NA	NA	SR

NA = Library holdings are collected materials, and as such do not have a life cycle with active and semi-active phases.

SR = BC Archives will selectively retain the BC Archives library holdings because they comprise a historical resource valuable to staff and to all citizens.

Most library holdings will be permanently retained because their historical value is not diminished over time. Some professional literature, unnecessary duplicates, and other obsolete materials may be removed and either destroyed or donated to another library.

FOI = Secondaries -20 to -40 cover records which have been identified under *FOIPPA* and related policies as PIBs or PURs.

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	<u>A</u>	<u>SA</u>	<u>FD</u>
13000 <u>ARRANGEMENT AND DESCRIPTION - GENERAL</u>			
<p>Records relating to archival arrangement and description functions not shown elsewhere in this primary block. Arrangement and description are interrelated activities. Arrangement consists of analyzing a body of records to determine their original order, physical composition, and any relationships to other records. Description documents and explains that arrangement in order to gain physical and intellectual control over the records. The description process involves developing standardized access tools of various kinds to document not only the arrangement, but also the content of the records, basic information about their creator, and other information required in order for researchers to be able to understand and use the records.</p> <p>Record types include correspondence, memoranda, working notes, and lists.</p> <p>For access initiatives relating to descriptive projects (e.g., finding aid conversion project), see secondary 15150-20. For the development of archival arrangement and description standards, see secondary 11370-40. For national/international descriptive projects (e.g., RAD, CAIN) see secondary 11000-30.</p> <p>Unless otherwise specified below, the ministry OPR (Information Management Systems and Standards) will retain these records for:</p>			
	CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>			
	<u>SO</u>	<u>nil</u>	DE
-00 Policy and procedures		5y	FR
			- OPR <u>SO</u>
			- <u>non-OPR</u> <u>SO</u>
-01 General		<u>nil</u>	<u>DE</u>
-03 Arrangement and description issues	SO	nil	SR

SR = BC Archives will retain those arrangement and description issues files that branch staff identify as significant, due to the nature of the issues and whether or not they are adequately documented elsewhere. All other records covered by this secondary will be boxed separately and destroyed.

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13000	<u>ARRANGEMENT AND DESCRIPTION - GENERAL</u> (continued)			
-05	Descriptive system documentation (includes conversion lists, background information about descriptive systems, and related documentation)	SO	nil	SR
	SO = when descriptive system no longer exists or when the information has been converted to another form			
	SR = BC Archives will retain those descriptive system documentation files with valuable information about the history and development of descriptive systems. All other files covered by this secondary will be boxed separately and destroyed.			
	NOTE: Do not classify any documentation of descriptive systems that follow <i>Rules for Archival Description (RAD)</i> here. This secondary is intended for documentation of descriptive systems developed before <i>RAD</i> became the standard at the BC Archives (e.g., the pre-1975 classification system for textual records [ADI0054], the listing of maps transferred from other archival media units to the former Maps and Plans Section [ADI0412], and the map call number conversion list [ADI0417]).			
-20	Description working files	SO	nil	DE
	SO = when work is completed and/or all useful information is recorded elsewhere			
	NOTE: Do not classify any <i>RAD</i> -description related material under this secondary; it is intended for documentation of legacy descriptive systems and other descriptive systems developed before <i>RAD</i> became the standard descriptive system at the BC Archives.			
	NOTE: See Appendix A for listings of legacy descriptive system documentation and working files.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
13010	<u>ARRANGEMENT AND DESCRIPTION - HISTORY/BIOGRAPHY</u>				
	Records relating to the documentation of administrative histories of government and non-government institutions, as well as the development of biographical sketches for records creators, including elected officials. This information is used in the development of finding aids.				
	Administrative histories are created regardless of the applicability of the <i>Document Disposal Act</i> to a given records creator. They include BC government agencies, Crown corporations, non-government corporate entities, and associations.				
	Record types include correspondence, memoranda, organizational charts, news clippings, resumes, annual reports, working notes, and draft and final administrative histories and biographical sketches.				
	NOTE: Most documentation relating to administrative histories and biographical sketches currently being compiled is not classified under this primary. See finding aid development files classified under secondary 13050-30.				
	For finding aids, see primary 13050. For legacy files relating to creators of cartographic and architectural records, sound and moving images, and visual records, see primary 13200.				
	Unless otherwise specified below, the ministry OPR (Belleville central files and Yates central files) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	DE
	-00 Policy and procedures	- OPR	<u>SO</u>	5y	FR
	-01 General	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
PIB	-20 Histories/biographical sketches (arrange by corporate or personal name)		SO	nil	FR

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13010	<u>ARRANGEMENT AND DESCRIPTION - HISTORY/BIOGRAPHY</u> (continued)			
	FR = BC Archives will keep the final version of each administrative history or biographical sketch because these records document the creators of archival holdings. All previous versions will be destroyed. The evolution of the history/ biography over time is adequately documented under secondary -30.			
PIB	-30 History/biography development files (arrange by corporate or personal name, or by position title)	SO+2y	nil	FR
	SO = upon finalization of the administrative history or biographical sketch			
	FR = BC Archives will fully retain administrative history and biographical sketch development files because of their long-term value in the preparation of access tools for archival holdings.			
	NOTE: In Yates central files, a separate file is opened for each minister or deputy minister when appointed, and the information distributed to staff at that time (by memo or via the internet) is placed on the file.			

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A SA FD

13050 ARRANGEMENT AND DESCRIPTION - ACCESS TOOLS

Records relating to the creation of all types of manual and automated tools for accessing archival records.

Most of the access tools covered by this primary were generated by legacy systems that have been discontinued due to organizational and technical changes. Prior to 1989, archival holdings were organized according to media, and separate access tools were created for the different media, as follows: cartographic and architectural; textual (known as manuscripts and government records); paintings, drawings and prints (PDP); photographs; and sound and moving images. Some of these access tools continued to be created in much the same way after 1989, but new systems were developed to encompass records in all media. Many of the access tools are organized according to legacy accessioning systems (covered by primary 12410), although in most cases name and subject indexes are also available.

As well as legacy descriptive systems, there are also some older descriptive systems still in use that pre-date BC Archives' adherence to the *Rules for Descriptive Standards (RAD)*. While all the resulting access tools are termed "legacy" in this primary, the Archival Documentation Inventory entries listed in Appendix A identify each system as open or closed.

The following milestones have shaped the current descriptive system at the BC Archives:

- Since 1991, the main accessioning system used at the BC Archives is Archives and Records Information System (ARIS), the corporate database used to manage archival records.
- In 2000, a new descriptive system was established based on the Canadian archival descriptive standards manual *Rules for Archival Description (RAD)*.
- In 2001 of a system of 8-digit unique identification alphanumeric codes (e.g., AAAA0037) was designed to cover all descriptive entities at the BC Archives.
- In 1995, the BC Archives web site was established, and since that time an increasing number of BC Archives access tools have been made available on it. The web site can be viewed at <http://www.bcarchives.gov.bc.ca/>

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13050	<u>ARRANGEMENT AND DESCRIPTION - ACCESS TOOLS</u> (continued) Additional access tools maintained by the BC Archives library cover: the sheet music collection, the performing arts program collection, historic atlases, and newspapers (originals and microfilm). Many published materials are integrated with the archival holdings, such as published maps, photographs, films, and government publications.			
-05	Accession control records (ACR) (arranged by GR or MS number) (covers catalogue entries, name and subject access points, and other documentation of textual records described using the GR and MS system)	SO	nil	FR
	SO = when information is fully duplicated in another medium or format (e.g., ARIS or the relevant finding aid)			
	FR = BC Archives will fully retain accession control records because they document archival holdings and related access tools.			
	NOTE: The accession control records contain the draft catalogue records, as well as correspondence with donors and other relevant documentation. The card catalogue for the GR and MS system provides name and subject index access to these records.			
-10	Shelf list cards (arrange in same order as the holdings on the shelves) (covers shelf lists for catalogue card descriptions of library and archival holdings in all media)	SO	nil	FR
	FR = BC Archives will fully retain shelf list cards in their original order because these provide a unique and valuable inventory of portions of the holdings and of the access tools created for them, even after those access tools have been superseded.			
	Sets of shelf list cards have some special features not immediately evident. Many contain annotations not found elsewhere. Also, it has been the practice to			
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		<u>A</u>	<u>SA</u>	<u>FD</u>
13050	<u>ARRANGEMENT AND DESCRIPTION - ACCESS TOOLS</u> (continued) place decommissioned catalogue cards with the relevant shelf list cards, so that subject headings, cross-references to new access tools, and other information is often available (e.g., the shelf list cards for the Old Manuscript Catalogue include catalogue cards removed from the Reference Room catalogue when the holdings described there were re-described).			
PUR	-20 Standardized finding aids (also known as "RAD descriptions") (covers finding aids created by the BC Archives in accordance with in-house and national standards) (arrange by unique identifier number) OPR = Belleville central files SO = upon revision of finding aid or the deaccessioning of the corresponding archival records SR = The BC Archives will retain the final paper version of each finding aid because finding aids describe BC Archives permanent archival holdings. All previous versions will be destroyed. The evolution of the finding aid over time is adequately documented under secondary -30. The BC Archives will retain the master copy of each electronic finding aid for which there is no paper version. All other electronic versions and copies will be destroyed. NOTE: This secondary does not cover the legacy access tools for textual records commonly referred to as "finding aids"; these are covered by secondary -45.	SO	nil	SR
	-30 Finding aid development files (includes research and working notes, copies of relevant documents from the ORCS review process [originals filed under secondary 12760-20], and other relevant documentation)	SO+2y	nil	FR

(continued on next page)

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		A	SA	FD
13050	<u>ARRANGEMENT AND DESCRIPTION - ACCESS TOOLS</u> (continued)			
	(arrange by unique identifier number or by topic [e.g., dissolved company files, vital statistics-birth])			
	OPR = Yates central files, except for files containing "dummy transfer accession" file lists, which are in Belleville central files			
	SO = when finding aid is no longer in use			
	FR = BC Archives will fully retain finding aid development files because they have long-term value for preparing new access tools, contain additional information about archival holdings, and document the evolution of holdings and access tools over time.			
-40	Legacy access tools – maps and plans (also known as cartographic/architectural finding aids) (arrange by accession number or call number)	SO	nil	FR
	NOTE: The main access tools for cartographic and architectural records (also known as "maps and plans") are two card catalogues known as the "old catalogue" and the "new catalogue". The latter covers maps described between 1985 and 1990, is available on the BC Archives web site, and has associated "map finding aids". There is also a conversion list for those maps originally covered by the old catalogue that were later converted to the new one. For additional access tools covering these holdings, see Appendix A.			
-45	Legacy access tools – textual records (also known as manuscripts and government records finding aids) (covers descriptions of textual records holdings, with some information about other media)	SO	nil	FR
	NOTE: This secondary covers several different access tool systems.			
	The Old Manuscript Catalogue, closed in 1975, describes records arranged according to a unique			
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		<u>A</u>	<u>SA</u>	<u>FD</u>
13050	<u>ARRANGEMENT AND DESCRIPTION - ACCESS TOOLS</u> (continued)			
	<p>subject-based classification scheme. Many of the records it formerly covered have been converted to the Government Records (GR) and Historical Manuscript (MS or Add Mss) system.</p> <p>The GR and MS system card catalogue is accessible on a name/subject basis. The system has been continued but no new cards are being printed; catalogue entries are available on the web site. Entries for this system are generated from the accession control records (ACR) classified under secondary -05.</p> <p>In addition to a catalogue entry/ACR description, descriptive file lists have been developed for many of the GR/MS accessions. These are known as "the finding aids" and are available on the web site, as well as in paper form in the Reference Room. Some of the finding aids in this series provide additional descriptive information about the records, their creators, and related holdings in other media.</p> <p>For additional information about these and other access tools for textual records, see Appendix A.</p>			
-50	Legacy access tools – PDP ("PDP" means paintings, drawings and prints) (arrange by PDP number or artist's name)	SO	nil	FR
-55	Legacy access tools - photographic (arrange by accession number)	SO	nil	FR
-60	Legacy access tools - sound and moving images (also known as SMID [Sound and Moving Image Division] files) (includes computer printouts, shot lists, audition notes, and descriptive inventories) (arrange by accession number)	SO	nil	FR
	<p>NOTE: SMID legacy access tools, maintained from the 1970s to the 1990s, include the following:</p> <ul style="list-style-type: none"> inventories of sound recordings in different media <p align="center">(continued on next page)</p>			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13050	<u>ARRANGEMENT AND DESCRIPTION - ACCESS TOOLS</u> (continued) <ul style="list-style-type: none">• documentation files with general information relating to sound tapes, sound discs, films, and videotapes• indexes (mostly in card catalogue form) to film and video, aural history tapes, sound recordings (known as the audio/video card catalogue), interviewees, radio broadcasts, and music (BC Music Collection)• annotated copies of published guides and update binders for these• interviewee collection log			
	SO = for all legacy access tools, upon generation of new finding aid or conversion to another media			
	FR = The BC Archives will fully retain all types of legacy access tools. These records provide valuable information about the holdings and also about the history of management and access tools over time.			
	NOTE: See Appendix A for a complete list of legacy access tools. Legacy accession files relating to these tools are classified under secondary 12410-30, and are also listed in Appendix A.			
-70	Online descriptive indexes (electronic databases)	SO	nil	SR
	SO = when the information kept on the database has been migrated or transferred to another system			
	SR = The BC Archives will retain those online descriptive indexes that contain unique descriptive information not available elsewhere. These records describe the holdings of the BC Archives. All other records covered by this secondary may be destroyed when they become inactive.			
	NOTE: This secondary covers access tools developed to be accessed on the BC Archives Web site using a search engine. These access tools include the moving image records index, the textual records index, the visual records index, and the vital events index.			
	NOTE: Because these are simple systems, information system overviews has not been developed for them.			

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A SA FD

13150 ARRANGEMENT AND DESCRIPTION – AUTHORITY CONTROL

Records relating to the establishment of standard name headings and subject headings for use in description of archival and library holdings, and for records management purposes.

The electronic 'Name Authority' table is part of the Archives and Records Information System (ARIS), the corporate database used to manage government's semi-active and archival records. This table serves as a comprehensive organization chart of the BC Government over time (pre-1991 records creators are primarily identified at the ministry or agency level). The name authority (among other functions) tracks the creators and legal custodians of records that have been transferred to off-site storage facilities or to the custody of BC Archives. It preserves information about the context in which records were created, used, and acquired by BC Archives.

Name headings are established on ARIS for records creators, transferring agents, current legal custodians, prior legal custodians, and include both government and non-government agencies.

This primary also covers the Central Name Authority card file (CNAF) which is used to provide name headings for archival material in all formats. Name headings are established on CNAF for use in library catalogue entries and archival descriptions.

Record types include correspondence, memoranda, name authority worksheets, catalogue cards, reports, electronic records, and organization charts.

For archival descriptions, see primary 13050.
 For ARIS, see the Information System Overview section.
 For the library catalogue, see secondary 13050-04.

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

CY+2y nil DE

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

SO nil DE

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

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13150	<u>ARRANGEMENT AND DESCRIPTION - AUTHORITY CONTROL</u> (continued)			
-03	ARIS name authority table (electronic records)	SO	nil	FR
	NOTE: The ARIS name authority table provides a history of government organizational changes since 1 April 1991, with ministry level changes documented back to 1871.			
-04	Central Name Authority File (CNAF) (consists of a card catalogue with pre-1993 entries and an electronic catalogue for entries created since then, stored on the Voyager System)	SO	nil	FR
	OPR = BC Archives Library			
-06	Subject authority headings	SO	nil	FR
	OPR = BC Archives			
	NOTE: This secondary covers in-house classification systems including those created for the accession control records (ACRs, classified under 13050-05), the library "Voyager" subject authorities, and the visual records subject headings. All of these are maintained on the local area network (LAN).			
-08	Legacy name and subject authority headings (covers non-centralized headings, mostly created before CNAF was established)	SO	nil	FR
	NOTE: See Appendix A for a detailed listing of these records.			
	FR = BC Archives will fully retain all types of name and subject authority systems used over time, because they have been used as access points for many of the archival and library holdings. In addition, the Central Name Authority File headings for BC Government entities provide a history of organizational change within the government (with particularly reliable detail from 1991 on, when the ARIS name authority was established).			

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OPR = Office of Primary Responsibility		VR = Vital Records

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13150	<u>ARRANGEMENT AND DESCRIPTION - AUTHORITY CONTROL</u> (continued)			
-20	Name authority requests (includes correspondence, annotated copies of organization charts, and related documents) (arrange by name authority and then by name) SO = when the change is made, and when no longer required for reference purposes	SO	nil	DE
-40	Name authority reports (includes ARIS indented organization charts [ARS 472]) (arrange by ministry or agency) (paper and electronic) SO = when paper report is no longer needed for reference purposes, and when electronic report is sent to the appropriate records officer	SO	nil	DE
-50	Name authority worksheets (ARS 470) (arrange by name) SO = upon entry onto ARIS and verification of data, and when no longer required for reference purposes	SO	nil	DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
13200	<u>ARRANGEMENT AND DESCRIPTION - RESEARCH COLLECTION</u>				
	Records relating to a collection of research files on archival holdings and their creators, as well as a collection of film catalogues. This research material is used to support acquisition recommendations, answer inquiries, and fulfill the general informational requirements of staff.				
	Record types include correspondence, memoranda, research notes, catalogues, and other types of records as indicated under relevant secondaries.				
	For the creators of textual records, see the administrative histories and biographical sketches, under primary 13010.				
	Unless otherwise specified below, the ministry OPR (Access Services) will retain these records for:				
			CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:				
			<u>SO</u>	<u>nil</u>	DE
	-00	Policy and procedures			
					- OPR
			<u>SO</u>	5y	FR
					- <u>non-OPR</u>
			<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01	General			
PIB	-20	Creators of architectural records files (also known as architects cards; labeled "architects 1899-1923") (arrange by name of creator)	SO	nil	FR
PIB	-25	Creators of sound and moving images files (covers SMID vertical files as well as sound tape creators and interviewers lists) (arrange by name of creator)	SO	nil	FR
		NOTE: These records include published information about oral history, research trends, and bibliographic information.			
PIB	-30	Creators of visual records files (also known as photographers files and artists files) (includes photocopies of photographs and other documentation) (arrange by name of creator)	SO	nil	FR

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				VR =	Vital Records

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	<u>A</u>	<u>SA</u>	<u>FD</u>	
13200	<u>ARRANGEMENT AND DESCRIPTION - RESEARCH COLLECTION</u>			
	(continued)			
	NOTE: These records contain information about archival photographs, paintings, drawings, and prints, and information about prominent artists and photographers.			
	FR = BC Archives will fully retain files concerning creators of architectural, sound and moving images, and visual records because of their long-term value in the preparation of access tools for archival holdings.			
-40	Film/video catalogues (FCAT) (arrange by distributor)	SO	nil	FR
	FR = BC Archives will fully retain film and video catalogues because they document film and video production in or about British Columbia.			
	NOTE: FCAT is a collection of published and unpublished government and private sector film catalogues dating from 1982 to 1986 that include descriptions of films relevant to British Columbia. The index to FCAT is classified under secondary 13050-60 (ADI0162).			
-50	Legacy research files (covers files maintained by former media divisions such as sound and moving images division, the maps program, and the textual records section)	SO	nil	SR
	SR = BC Archives will retain those legacy research files which provide useful documentation relating to archival holdings. All other legacy research files will be boxed separately and destroyed.			
	NOTE: See Appendix A for further information about the records covered by this primary.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
13770	<u>IMAGING PROJECTS</u>				
	Records relating to review of government electronic and micrographic imaging projects. These projects must be evaluated and technically assessed by BC Archives, as required under <i>General Management Operating Policy</i> .				
	This primary also covers quality control inspection of microfilm after it has been processed, and quality assurance testing of the microfilm stored in the BC Archives microfilm vault. Microfilm processing quality control inspection report forms and microfilm quality assurance report forms document the processing of microfilm and management of the process according to government policies and procedures.				
	Record types include correspondence, memoranda, service requests, specifications, copies of contracts, and reports.				
	For BC Archives microfilming projects, see primary 14435. For contract tenders and awards, see <i>ARCS</i> primary 1080. For microfilm vault retrievals, see primary 12630. For micrographic processing and inspection, see primary 14440.				
	Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:		CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	nil	DE
-00	Policy and procedures	- OPR	<u>SO</u>	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Micrographic project files (arrange by project)		SO+1y	nil	DE
	SO = when the corresponding microfilm has been destroyed				
	NOTE: These project files provide evidence that the microfilm has been filmed, processed, inspected and managed according to government policies and procedures.				

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13770	<u>IMAGING PROJECTS</u> (continued)			
	NOTE Quality control inspection reports are created by staff in the micrographic services laboratory and classified under secondary 14440-10 until the related filming project is completed, then they are reclassified to this secondary.			
-30	Electronic imaging project files (arrange by project)	SO+1y	nil	DE
	SO = when the corresponding electronic images have been destroyed			
	NOTE: These project files provide evidence that the electronic images have been created and managed according to government policies and procedures.			
-35	Imaging issues and projects files (arrange by topic)	CY+4y	nil	SR
	NOTE: Most of these records were previously classified under primary 13640, which no longer exists.			
	SR = BC Archives will retain those imaging issues and projects files that document significant issues and projects in the history of BC Government imaging programs. All other files covered by this secondary will be boxed separately and destroyed.			

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SA

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SECTION 3

PRESERVATION AND CONSERVATION

PRIMARY NUMBERS

13900 - 15099

Section 3 covers records relating to the preservation and conservation of all BC Archives holdings, regardless of media, as well as other government records of enduring value that have not yet been transferred to the Archives. This includes records relating to: establishing requirements for the care and handling, environmental conditions, pest control, and storage and housing of archival holdings in all media; reporting on the condition and treatment of archival holdings; testing and analyzing archival conservation and storage materials; surveying archival records in order to determine conservation and preservation needs and to establish treatment priorities; preparing emergency and disaster preparedness plans for the protection of archival records; microfilming archival holdings; duplicating photographic holdings that require conservation and preservation; processing orders for reproductions of archival material; and processing microfilm and photographic image orders.

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13900 - PRESERVATION AND CONSERVATION - 15099

PRIMARY NUMBERS AND PRIMARY SUBJECTS

- 13900 PRESERVATION AND CONSERVATION - GENERAL

- 13905 ARCHIVAL MEDIA - GENERAL
- 13910 - CARTOGRAPHIC AND ARCHITECTURAL
- 13930 - ELECTRONIC
- 13940 - GRAPHIC
- 13950 - MICROFILM
- 13960 - MOVING IMAGES
- 13980 - SOUND RECORDINGS
- 13990 - TEXTUAL

- 14000 RECORDS PRESERVATION - GENERAL
- 14100 - CARE AND HANDLING
- 14120 - TREATMENT REPORTING
- 14150 - EMERGENCY PREPAREDNESS
- 14170 - ENVIRONMENTAL MONITORING
- 14200 - MATERIAL TESTING
- 14240 - PEST CONTROL
- 14260 - SURVEYS AND PLANNING

- 14430 MICROGRAPHIC SERVICES - GENERAL
- 14435 - FILMING PROJECTS
- 14440 - PROCESSING AND INSPECTION

- 14520 PHOTOGRAPHIC PROCESSING SERVICES

- 14600 REPRODUCTION SERVICES

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13900 PRESERVATION AND CONSERVATION - GENERAL

Records not shown elsewhere in the preservation and conservation section which relate generally to the preservation and conservation of all archival materials, regardless of media, in the BC Archives.

The BC Archives is responsible for the safekeeping, physical care, location, and long-term preservation of all records, in all media, in its legal custody. In addition, BC Archives is responsible for overseeing the physical care, maintenance, and long-term preservation of all government records of enduring value in all ministries and government offices. To this end, it develops policies and procedures, and sets standards and practices, governing the preservation of records while they are kept in these offices. The policies and standards include provisions for records creation, housing and storage, care and handling, environmental conditions, as well as disaster recovery and records salvage plans. In addition to advising government agencies, the BC Archives provides limited advisory services to other institutions or bodies holding archival records, and to the public.

Preservation consists of all the measures taken to extend the life span, indefinitely, of records possessing long-term evidential and/or historical value. An example of a strategy for records preservation is the duplication of a record for access and use, while other methods are used to preserve the original.

Conservation involves taking remedial actions of some kind intended to halt a record's deterioration or to "restore" a record to, if not its original condition, at least to a condition in which it is, once again, useable.

Record types include an electronic database, correspondence, and memoranda.

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

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant *ORCS* secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under *ARCS* secondary 202-20 or 204-20.

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A SA FD

13900 PRESERVATION AND CONSERVATION - GENERAL (continued)

into Historic Photographs [HP] and paintings, drawings, and prints [PDP]); cartographic records (maps and plans); sound and moving image records (subdivided into Moving Image records [films and videos] and Sound Recordings); and library materials. The inventories of PDP and library materials document monetary evaluations in addition to the standard information provided in the other inventories.

Because this is a simple system created using Microsoft Access, an information system overview has not been developed.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13910	<u>ARCHIVAL MEDIA - CARTOGRAPHIC AND ARCHITECTURAL</u>			
<p>Records relating to the preservation and conservation of the cartographic and architectural holdings of the BC Archives. This work involves researching and documenting the best methods and techniques for creating, preserving and conserving these records, as well as establishing requirements for their storage and housing. Much of this research involves conducting tests on materials, as well as corresponding with experts and manufacturers. Research documentation may take the form of journal articles and handouts as well as formal reports.</p> <p>Record types include correspondence, memoranda, copies of published articles, notes, handouts, studies and reports.</p> <p>For the care and handling of cartographic and architectural records, see primary 14100. For environmental conditions for cartographic and architectural records, see primary 14170.</p> <p>Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:</p>				
		CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>				
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	5y <u>nil</u>
-01	General			FR <u>DE</u>
-02	Cartographic and architectural materials research		SO	nil SR
-03	Cartographic and architectural materials storage		SO	nil SR

SO = when information in the files is superseded by more recent research

SR = The BC Archives will retain those research files and storage and housing files that document research and decisions of BC Archives staff. All other files covered by these secondaries will be boxed separately and destroyed.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
13940	<u>ARCHIVAL MEDIA - GRAPHIC</u>			
<p>Records relating to the preservation and conservation of the paintings, drawings, prints, and photographic holdings of the BC Archives. This work involves researching and documenting the best methods and techniques for creating, preserving and conserving these records, as well as establishing requirements for their storage and housing. Much of this research involves conducting tests on materials, as well as corresponding with experts and manufacturers. Research documentation may take the form of journal articles and handouts as well as formal reports.</p> <p>Record types include correspondence, memoranda, copies of published articles, notes, handouts, studies and reports.</p> <p>For the care and handling of graphic records, see primary 14100. For environmental conditions for graphic records, see primary 14170.</p> <p>Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:</p>				
		CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>				
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	SO	5y	FR
		- OPR		
		- <u>non-OPR</u>	<u>nil</u>	<u>DE</u>
-01	General			
-02	Graphic records research files	SO	nil	SR
-03	Graphic records storage and housing	SO	nil	SR

SO = when information in the files is superseded by more recent research

SR = The BC Archives will retain those research files and storage and housing files that document research and decisions of BC Archives staff. All other files covered by these secondaries will be boxed separately and destroyed.

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		<u>A</u>	<u>SA</u>	<u>FD</u>	
13960	<u>ARCHIVAL MEDIA - MOVING IMAGES</u>				
<p>Records relating to the preservation and conservation of moving images and audio-visual records within the archival holdings of the BC Archives. This work involves researching and documenting the best methods and techniques for creating, preserving and conserving these records, as well as establishing requirements for their storage and housing. Much of this research involves conducting tests on materials, as well as corresponding with experts and manufacturers. Research documentation may take the form of journal articles and handouts as well as formal reports.</p> <p>Record types include correspondence, memoranda, copies of published articles, notes, handouts, studies and reports.</p> <p>For the care and handling of moving images, see primary 14100. For environmental conditions for moving images, see primary 14170.</p> <p>Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:</p>					
		CY+2y	nil	DE	
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>					
		<u>SO</u>	<u>nil</u>	DE	
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-02	Moving image research files		SO	nil	SR
-03	Moving image storage and housing		SO	nil	SR

SO = when information in the files is superseded by more recent research

SR = The BC Archives will retain those research files and storage and housing files that document research and decisions of BC Archives staff. All other files covered by these secondaries will be boxed separately and destroyed.

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A SA FD

13990 ARCHIVAL MEDIA - TEXTUAL RECORDS

Records relating to the preservation and conservation of the manuscript holdings of the BC Archives This work involves researching and documenting the best methods and techniques for creating, preserving and conserving these records, as well as establishing requirements for their storage and housing. Much of this research involves conducting tests on materials, as well as corresponding with experts and manufacturers. Research documentation may take the form of journal articles and handouts as well as formal reports.

Record types include correspondence, memoranda, copies of published articles, notes, handouts, studies and reports.

For the care and handling of textual records, see primary 14100.
For environmental conditions for textual records, see primary 14170.

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

CY+2y nil DE

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

SO nil DE

-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Textual records research files		SO	nil	SR
-03	Textual records storage and housing		SO	nil	SR

SO = when information in the files is superseded by more recent research

SR = The BC Archives will retain those research files and storage and housing files that document research and decisions of BC Archives staff. All other files covered by these secondaries will be boxed separately and destroyed.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14000	<u>RECORDS PRESERVATION - GENERAL</u>			
	Records relating to the preservation of archival records not shown elsewhere in this primary block. This primary also covers advice provided to provincial government client agencies and private individuals and organizations (including other archival institutions) on conservation and preservation issues and concerns.			
	Record types include correspondence, memoranda, and reports.			
	For advisory services relating to records management and other archival issues, see primary 11860.			
	For advisory services relating to recovery of records damaged in disasters, see primary 14150.			
	For preservation/conservation inquiry log, see ARCS secondary 255-30.			
	Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	SO	5y	FR
				<u>DE</u>
-01	General	<u>SO</u>	<u>nil</u>	<u>DE</u>
-03	Preservation/conservation advice to general public (arrange chronologically)	SO+1y	nil	SR
	SR = BC Archives will retain those advice to general public files that document significant preservation and conservation issues. Files covered by this secondary that are not identified by Preservation Services staff as significant will be boxed separately and destroyed.			
-05	Preservation/conservation reports (covers statistical and other types of information)	SO	nil	SR
	SR = BC Archives will selectively retain preservation/conservation reports because they document the history of the program. This selection will include the final version of each annual report as well as any additional statistical, quarterly, or other reports that			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14000	<u>RECORDS PRESERVATION - GENERAL</u> (continued)			
	contain information not included or summarized in annual reports. All other records covered by this secondary will be boxed separately and destroyed.			
-20	Preservation/conservation advisory case files (arrange by name of ministry/agency client)	SO	nil	SR
	SR = BC Archives will retain those client advisory case files that document significant preservation and conservation issues. Files covered by this secondary that are not identified by Preservation Services staff as significant will be boxed separately and destroyed.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14100	<u>RECORDS PRESERVATION - CARE AND HANDLING</u>			
	Records relating to researching and establishing requirements for the care and handling of archival materials.			
	Record types include correspondence, memoranda, copies of published articles, notes, studies and reports.			
	For environmental conditions for archival records, see primary 14170. For the storage and housing of archival records, see secondary -03 under primaries 13905 to 13990.			
	Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures			
				- OPR
		SO	5y	FR
				- <u>non-OPR</u>
		<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-02	Care and handling research files	SO	nil	SR

SR = BC Archives will retain those care and handling files that document research and decisions made by BC Archives staff. All other files covered by this secondary will be boxed separately and destroyed.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14150	<u>RECORDS PRESERVATION - EMERGENCY PREPAREDNESS</u> (continued)			
-04	Emergency and disaster plan research files (includes contact lists, reference materials, and drafts and proposed revisions of plans)	SO	nil	DE
-05	Emergency and disaster plans – other agencies (includes copies of plans that may be received from client agencies)	SO	nil	DE
-30	Disaster response case files (includes correspondence, lists, slides, and notes) (covers documentation on damaged documents in the custody of BC Archives and other government ministries/agencies) (arrange by name of records creator, building, or storage company)	SO	nil	SR

SR = BC Archives will retain those disaster response case files that document significant disasters and/or precedent-setting responses to them. All other files covered by this secondary will be boxed separately and destroyed.

NOTE: These files contain general information on previous disasters and subsequent recovery efforts. Classify records relating to a specific accession on the relevant schedule application file (secondary 12830-03) or on the relevant condition and treatment reports file (secondary 14120-20).

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14170	<u>RECORDS PRESERVATION - ENVIRONMENTAL MONITORING</u> (continued)			
-03	Environmental monitoring research files (includes notes, studies and reports)	SO	nil	SR
	SO = when no longer required to demonstrate the need for environmental improvements			
	SR = BC Archives will retain those environmental monitoring research files that document original research by branch staff. All other records covered by this secondary (primarily reference materials) will be boxed separately and destroyed.			
-04	Hygrothermograph charts (covers monitoring at Belleville and also the microfilm vault)	SO	nil	FR
	SO = when no longer required to demonstrate the need for environmental improvements			
	FR = BC Archives will fully retain hygrothermagraph charts because they document the long-term effect of environmental conditions on the archival holdings.			
	NOTE: A hygrothermograph is a machine that measures temperature and relative humidity.			
-05	Logbook of environmental problems	SO	nil	FR
	FR = BC Archives will fully retain the logbook of environmental problems because it documents the long-term effect of environmental conditions on the archival holdings, and the measures taken to solve problems.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14200	<u>RECORDS PRESERVATION - MATERIAL TESTING</u>			
	Records relating to the testing and analysis of archival media in order to determine their permanence.			
	Record types include correspondence, memoranda and reports.			
	For product catalogues, see ARCS primary 703. For suppliers of conservation and storage products, see the relevant records preservation storage and housing file in primary block 14000-14260, or ARCS primary 703.			
	Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	SO	5y	FR
		- OPR		
		- <u>non-OPR</u>	<u>nil</u>	<u>DE</u>
-01	General			
-02	Conservation products (includes lists of products and proof of purchase documents [e.g., requisitions and purchase orders])	SO	nil	SR
	SR = BC Archives will retain those conservation product records that document the products used to conserve and preserve the archival holdings. All other records covered by this secondary (e.g., catalogues for products not used) will be boxed separately and destroyed.			
	NOTE: These records document the effectiveness of conservation products over time. They also document the actual procurement of the product which is required in the event of a product recall or future problems with the material.			
-20	Conservation and storage material test results (arrange by test)	SO	nil	FR
	FR = BC Archives will fully retain conservation and storage material test results because they document the materials used to preserve and house the archival holdings.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14240	<u>RECORDS PRESERVATION - PEST CONTROL</u>			
<p>Records relating to researching and establishing requirements for the control of pests (e.g., mould, insects and rodents) that are harmful to archival records. This includes information about pests, where and when they are detected, and how the problem is resolved.</p> <p>Record types include correspondence, memoranda, copies of published articles, notes, studies and reports.</p> <p>For the care and handling of archival records, see primary 14100. For environmental conditions for archival records, see primary 14170. For the storage and housing of archival records, see secondary -03 under primaries 13905 to 13990.</p> <p>Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:</p>				
		CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>				
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	SO	5y	FR
		- OPR		
		- <u>non-OPR</u>	<u>nil</u>	<u>DE</u>
-01	General			
-02	Mould	SO	nil	SR
-03	Insect infestations	SO	nil	SR
-04	Rodents	SO	nil	SR

SR = BC Archives will retain those pest control files that document the techniques used to prevent and control pests that are harmful to the archival holdings. All other records covered by this secondary (i.e., reference materials) will be boxed separately and destroyed.

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14260	<u>RECORDS PRESERVATION - SURVEYS AND PLANNING</u>			
	Records relating to surveying the archival records held by the BC Archives as well as those in client custody in order to determine conservation and preservation needs, establish treatment priorities, and identify required resources.			
	Record types include correspondence, memoranda, lists, and reports.			
	For advice given to clients, see primary 11860. For the development of government-wide preservation policies for archival records in client custody, see primary 11370. For records of the microfilm priorities committee, see ARCS secondary 202-20.			
	Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures			
				- OPR
				- <u>non-OPR</u>
-01	General	<u>SO</u>	5y	FR
		<u>SO</u>	<u>nil</u>	<u>DE</u>
-03	Conservation priority lists (covers correspondence and lists of records requiring microfilming and other conservation work)	SO	nil	SR
	SR = BC Archives will retain all conservation priority lists because they document decisions about conservation treatments, and the priorities established. All other records covered by this secondary (i.e., correspondence) will be boxed separately and destroyed.			
-04	Conservation surveys (includes reports and survey notes)	SO	nil	FR
	FR = BC Archives will fully retain conservation surveys because they document the overall condition of the archival holdings of the Province of British Columbia.			
	NOTE: This secondary covers microfilm blemish inspection reports (known as the "REDOX files"), as well as other types of conservation surveys.			

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A SA FD

14430 MICROGRAPHIC SERVICES – GENERAL

Records relating to archival microfilm (and microfiche) processing services not shown elsewhere in this primary block.

Ministries and agencies produce microfilm as part of approved micrographic projects, in most cases on the basis of a contract between the ministry/agency and a private company.

The BC Archives micrographic processing laboratory conducts the following tasks: reviews the microfilm for quality control purposes, processes the microfilm to archival standards, produces film duplicates (user copies), provides quality control review and quality assurance review for ministry clients and BC Archives in-house preservation microfilming, and stores the master copy in the BC Archives microfilm vault.

The BC Archives microfilm production unit conducts archival microfilming and keeps a record of microfilms it produces that are stored in the microfilm vault (also known as indexing), in order to preserve and provide access to deteriorating archival records held by BC Archives.

Record types include correspondence and memoranda.

For informational catalogues and materials relating to supplies and suppliers, see *ARCS* primary 703.

For quarterly reports and statistics, and reproduction tally sheets, see *ARCS* secondary 446-20.

For technical reference materials, see *ARCS* secondary 358-20.

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

CY+2y nil DE

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

SO nil DE

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

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14435	<u>MICROGRAPHIC SERVICES - FILMING PROJECTS</u>			
	Records relating to microfilming the holdings of the BC Archives that are identified for conversion to microfilm. Decisions about what to microfilm are made based on conservation priority lists.			
	Record types include correspondence, memoranda, lists, reports, indexes and title pages.			
	For client microform reproduction orders, see secondary 14600-20. For conservation priority lists, see secondary 14260-03. For microfilming projects for client agencies, see secondary 13770-20.			
	Unless otherwise specified below, the ministry OPR (Imaging Services) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	SO	5y	FR
				- OPR
		<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
				- <u>non-OPR</u>
-04	Microfilm output report (consists of a cumulative report maintained as a word-processing document and printed as required)	SO	nil	SR
	SO = upon generation of a report update			
	NOTE: This report provides summary information on completed microfilming projects (e.g., date microfilmed, microfilm roll number, government record (GR) number or manuscript (MS) number, and the disposition of the original (e.g., retained by BC Archives, transferred to another archival repository, or destroyed).			
-05	Microfilm conversion list	SO	nil	SR
	SO = upon generation of an updated list			
	NOTE: This list converts the microfilm number used in the archives reference room to the microfilm number and location in the vault. It is the only existing link between the vault location and the reference room copy.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14435	<u>MICROGRAPHIC SERVICES - FILMING PROJECTS</u> (continued)			
	NOTE: The microfilm conversion list is available to all staff in electronic form in townhall:/microfilm tracking, and in paper form in the pre-vault room.			
	SR = BC Archives will retain the final complete version of the microfilm output cumulative report and the microfilm conversion list because they document archival holdings on microfilm. All previous versions of the report and list will be destroyed, upon confirmation that they do not contain any information not included in the final report or list.			
-20	Filming projects (arrange by project) (covers filming project rough indexes [ARS 311] and microfilm studio title pages [ARS 320], microfilm project output reports [ARS 300], microfilm labels [ARS 560], and microfilm title pages [ARS 516])	SO	nil	DE
	SO = upon completion of filming project, and when no longer required for reference purposes			
	DE = Filming project case files will be destroyed because the essential documentation from them is available elsewhere. The rough filming project indexes are incorporated into finding aids classified under secondary 13050-20. The title pages are duplicated on the microfilm roll for the collection.			
-30	Legacy microfilm registers and lists (covers listings of microfilm numbers and related accessions and call numbers; see Appendix A)	SO	nil	SR
	SR = BC Archives will retain those legacy microfilm registers and lists that contain information not adequately documented in the microfilm output cumulative report or the microfilm conversion list. All other records covered by this secondary will be boxed separately and destroyed.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
14440	<u>MICROGRAPHIC SERVICES - PROCESSING AND INSPECTION</u>				
	Records relating to the processing and inspection of archival microfilm, as well as the duplication and inspection of client-ordered microfilm.				
	Ministries and agencies produce microfilm as part of approved micrographic projects, usually on the basis of a contract with a private company. BC Archives reviews the microform for quality control purposes, stores the master copy in the BC Archives microfilm vault, and produces a user copy for the ministry/agency.				
	Record types include correspondence, memoranda, conventional process control charts, processing production sheets, inspection notice books, quality control inspection reports, logs, graphs and reports.				
	For client microform reproduction orders, see primary 14600. For microfilm vault records, see primary 12630. For micrographic project records, see primary 13770. For processing photographs, see primary 14520.				
	Unless otherwise specified below, the ministry OPR (Imaging Services) will retain these records for:				
			CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:				
			<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Inspection notice books		SO+1y	nil	DE
	SO = when all notices in the book have been used				
	NOTE: Inspection notices are sent to microfilm equipment operators when microfilm inspection finds flaws in the microfilm caused by equipment failure. The books contain two-part forms. Part one is sent to the operator and part two remains in the book.				
-04	Process quality control (includes conventional process control charts)		CY+1y	nil	DE

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14440	<u>MICROGRAPHIC SERVICES - PROCESSING AND INSPECTION</u> (continued)			
-06	Methylene blue test results - micrographic (includes correspondence)	CY+4y	nil	DE
	NOTE: Methylene blue tests determine the amount of sodium thiosulfate residue on microfilm after processing. The residue may affect the longevity of the film image.			
	These tests are performed on average six times per year on a contractual basis. Each test result is documented in a one-page letter to the BC Archives.			
-08	Microfilm in/out logs (electronic records)	CY	nil	DE
	OPR = Yates central files			
-09	Processing production sheets	CY+1y	nil	DE
	NOTE: These sheets provide summary information on the microfilm that has been processed (e.g., date processed, chemicals used, and microfilm roll number)			
-10	Quality control inspection reports	SO	NA	NA
	SO = when the filming project is completed			
	NA = Inspection reports are reclassified to the relevant micrographic project file (secondary 13770-20).			
-20	Microfilm diazo duplication project files (includes diazo duplicates processing production sheets) (arrange chronologically)	SO+2y	nil	DE
	SO = upon completion of processing and inspection			
	NOTE: These sheets provide summary information on the processing of diazo duplicates for clients (e.g., the name of the client and microfilm reel number).			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14520	<u>PHOTOGRAPHIC PROCESSING SERVICES</u>			
<p>Records relating to processing archival prints, photographs, paintings, and drawings. This service encompasses preservation photography, duplication of black/white and colour images requested by clients, and digital reproductions for access to historical photographs on the BC Archives website (http://www.bcarchives.gov.bc.ca). Preservation photography mainly consists of producing negatives of photographic prints received without negatives, although inter-positive prints are also produced for deteriorating negatives.</p> <p>Record types include correspondence, memoranda, graphs, forms, and lists.</p> <p>For photographic media reproduction orders, see secondary 14640-20.</p> <p>Unless otherwise specified below, the ministry OPR (Imaging Services) will retain these records for:</p>				
		CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>				
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures	SO	5y	FR
		- OPR		
		- <u>non-OPR</u>	<u>nil</u>	<u>DE</u>
-01	General			
-04	Process quality control charts	CY+1y	nil	DE
-05	Methylene blue test results - photographic (includes correspondence)	CY+4y	nil	DE
<p>NOTE: Methylene blue tests determine the amount of sodium thiosulfate residue on film after processing. The residue may affect the longevity of the film image.</p> <p>These tests are performed on average six times per year on a contractual basis. Each test result is documented in a one-page letter to the BC Archives.</p>				
-20	Photographic project files (includes production forms) (arrange by project)	SO+2y	nil	DE
	SO = upon completion of project			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
14520	<u>PHOTOGRAPHIC PROCESSING SERVICES</u> (continued)			
	NOTE: The production forms in these files document the project number, the number of images processed on a given day, and how much film was used on a project. They are used for planning and budgeting purposes.			
-30	Photograph negative conversion lists (arrange by negative number)	SO	nil	FR

OPR = Access Services

FR = BC Archives will fully retain photograph negative conversion lists because they document the connection between original archival holdings and the master negatives that are copies of them.

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			<u>A</u>	<u>SA</u>	<u>FD</u>
14600	<u>REPRODUCTION SERVICES</u>				
	Records relating to making reproductions of archival holdings in response to orders received from researchers, or from a licensed agent who processes requests for reproductions for commercial use. Reproductions may take the form of paper photocopies, photographs in negative or print form, videotape, audiotape, or microfilm or electronic images.				
	Record types include order forms, correspondence and memoranda.				
	For accounts receivable and invoices, see ARCS primary 935.				
	For micrographic processing, see primary 14440.				
	For photographic processing services, see primary 14520.				
	For use permissions, see primary 15420.				
	For research inquiries that result in reproduction orders, see secondaries 15480-20 and -30.				
	Unless otherwise specified below, the ministry OPR (Belleville central files) will retain these records for:		CY+3y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	DE
	-00 Policy and procedures	- OPR	<u>SO</u>	5y	FR
	-01 General	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
PIB	-20 Cartographic and architectural reproduction orders (arrange by personal or corporate name of client)				
PIB	-25 Electronic record reproduction orders (arrange by personal or corporate name of client)				
PIB	-30 Image reproduction orders (arrange by personal or corporate name of client)				
PIB	-35 Photocopy orders (arrange first by commercial or private use, then by personal or corporate name of the client)				

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

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A SA FD

SECTION 4

PUBLIC PROGRAMS

PRIMARY NUMBERS

1 5 1 0 0 - 1 5 4 9 9

Section 4 covers records relating to public programs developed and delivered by the government archives. This includes records relating to: providing access to records in the control and custody of the BC Archives in compliance with the *Freedom of Information and Protection of Privacy Act* (RSBC 1996 c. 165) and other relevant legislation; responding to research inquiries; planning and implementing outreach activities such as tours, exhibits, and volunteer work; responding to requests for permission for the commercial use of archival materials; lending archival holdings to internal and external agencies; and managing initiatives to allow greater public access to provincial archival holdings and other government records.

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FY = Fiscal Year
NA = Not Applicable
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A SA FD

15100 - PUBLIC PROGRAMS - 15499

PRIMARY NUMBERS AND PRIMARY SUBJECTS

- 15100 PUBLIC PROGRAMS - GENERAL
- 15140 ARCHIVAL LOAN ADMINISTRATION
- 15150 ACCESS INITIATIVES
- 15350 ACCESS REVIEW
- 15420 INTELLECTUAL PROPERTY
- 15450 OUTREACH AND VOLUNTEER ACTIVITIES
- 15480 REFERENCE SERVICES

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A SA FD

15100 PUBLIC PROGRAMS - GENERAL

Records not shown elsewhere in the public programs section which relate generally to public programs developed by the BC Archives.

This primary covers the BC Archives web site which provides both onsite and remote access to the information holdings of BC Archives.

This primary also covers user guides that assist researchers using specific types of records (such as wills) or researching particular topics (such as aboriginal land claims).

Record types include a web site, handouts, brochures, working notes, correspondence, and memoranda.

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

NOTE: Committee records relating to programs and projects covered in this section should be filed under relevant ORCS secondaries, when they document decisions and actions. Agendas, minutes, and routine correspondence may be filed under ARCS secondary 202-20 or 204-20.

For the BC Archives web site, see the Information System Overview section.

For press releases, see ARCS primary 330.

For records of development of web pages and web links, see secondary 15150-20.

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

CY+2y nil DE

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

SO nil DE

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

OPR = Belleville central files and Yates central files

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15100	<u>PUBLIC PROGRAMS - GENERAL</u> (continued)			
	FR = Throughout this section, the government archives will fully retain policy and procedures records created by offices having primary responsibility for policy and procedure development and approval. These records have evidential value.			
-01	General			
-02	User guides (arrange by subject)	SO+3y	nil	FR
	SO = upon date of final publication			
	FR = BC Archives will fully retain user guides because they document the archival holdings and the way in which they have been made accessible over time.			
	NOTE: User guides include, among other things, documentation provided on the BC Archives web site; see pages entitled "On-Site Research Orientation Guide", "Inquiries and Information", "Genealogy", "Other Guides". These pages of them must be printed and filed before each significant update.			
-20	User guide development files (arrange by subject)	SO+3y	nil	DE
	SO = when replaced by a new guide			
-25	BC Archives web site (also known as the Public Access System [PAS])	SO	nil	SR
	SO = when the web site is updated, redesigned or closed			
	SR = BC Archives will retain designated pages from the BC Archives web site because they provide unique documentation of archival holdings and the history and activities of the BC Archives and its web site. Online exhibits, including those resulting from access initiatives and other projects (e.g., "Golden Jubilee", "Time Machine" and "Victoria 1889") will be retained in electronic form, in order to preserve their interactivity.			

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A SA FD

15100 PUBLIC PROGRAMS - GENERAL (continued)

The following web pages will be retained in paper form, by printing and filing them when specified below, and boxing the files with other records for archival retention:

- Main/introductory page. A copy will be printed prior to each significant update.
- "Using This Web Site". A copy of relevant search instructions from this section will be printed whenever a version of a searchable index (classified under secondary 13050-70) is retained.
- "More about the BC Archives" (currently covers a message from the Provincial Archivist, web site background information, and a brief history of the BC Archives). A copy will be printed prior to each significant update.
- "Additions And Enhancements To This Web Site" A copy will be printed whenever the list is partially or entirely removed from the web site.

All other records provided on the BC Archives web site may be deleted when they are no longer needed, because they are either classified elsewhere in the *ORCS* (mainly under secondaries 13050-70 [online descriptive indexes], 15100-02 [user guides], and 15450-02 [Friends of the BC Archives], as well as in -00 policy and procedures files) or are routine and minor in nature (e.g., links to other web sites).

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15140	<u>ARCHIVAL LOAN ADMINISTRATION</u>			
<p>Records relating to the administration of loans of provincial archival holdings to internal and external agencies. Administering loans involves the following tasks: receiving and evaluating loan requests; liaising with the borrowing agency regarding scheduling, insurance; setting and communicating standards for borrowing institution facilities; documenting the loan agreements (including charges and restrictions); arranging for a financial appraisal of the relevant holdings for insurance purposes; completing condition reports concerning the physical state of the items to be loaned; securely packing and sending those items to the borrower using the appropriate authorized transport method; and liaising with the borrower regarding exhibition issues and return of the borrowed items.</p> <p>For those exhibits that are shown in two or more venues, BC Archives works with one exhibit coordinator rather than with each borrowing agency.</p> <p>Record types include correspondence, memoranda, forms, agreements, shipping receipts, insurance documents, notes, and copies of condition and treatment reports.</p> <p>For condition and treatment reports, see primary 14120.</p> <p>Unless otherwise specified below, the ministry OPR (Preservation Services) will retain these records for:</p>				
		CY+2y	nil	DE
<p>Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:</p>				
		<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures			
				- OPR
		<u>SO</u>	5y	FR
				- <u>non-OPR</u>
		<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General			
-03	Loan registry (electronic database)	SO	nil	FR
<p>SO = when no longer required for operational use</p> <p>FR = BC Archives will retain this registry as it provides a record of all archival holdings on loaned on a temporary or extended basis.</p>				

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A SA FD

15140 ARCHIVAL LOAN ADMINISTRATION (continued)

NOTE: The loan registry database was established in 2001. Information is entered using a loans tracking data entry form. The database is composed of four tables: one concerns borrowers, another lists items included in each loan, one tracks the progress of each loan, and the fourth concerns accessions from which items are loaned. Certain fields, especially those used in the fourth table, are drawn from a separate but linked database, the Preservation database.

-40	Loan case files (arrange by borrower or exhibit coordinator) (includes a loan tracking form, loan application form [ARS 462], loan condition reports, facilities reports, signed loan agreements, insurance documentation, correspondence, and other loans documentation)	SO+1y	5y	FR
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SO = upon return of loaned material and resolution of any insurance issues

FR = BC Archives will fully retain loan case files because they document the curatorial history of certain archival holdings. Information about conservation issues, forgery issues, and other issues is provided in these files. The records of specific loans may add information concerning the significance and value of the relevant holdings.

NOTE: Documentation relating to the loan of archival material should be cross-referenced to the relevant accession file (secondary 12410-02).

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		<u>A</u>	<u>SA</u>	<u>FD</u>	
15150	<u>ACCESS INITIATIVES</u>				
	Records relating to managing access initiatives, mainly projects that allow greater public access to provincial archival holdings (e.g., the cartographic and School Net projects), as well as to other government records (e.g., vital statistics) using the World Wide Web. These initiatives may involve partnership arrangements with other government or private sector organizations.				
	Record types include correspondence, memoranda, proposals, and web pages.				
	For the actual creation and maintenance of access tools, see primary 13050.				
	For the BC Archives Web site, see the Information System Overview section.				
	For committees established to oversee access initiatives (e.g., BC Archives Remote Access Team [BRAT] and the Public Access Group [PAG]), see ARCS secondaries 202-20 and 204-20.				
	For imaging project files, see primary 13770.				
	For online descriptive indexes (e.g., vital events index and visual records index) see secondary 13050-70.				
	For projects that are funded by grants, see secondary 11000-20.				
	Unless otherwise specified below, the ministry OPR (Yates central files) will retain these records for:	CY+2y	nil	DE	
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE	
-00	Policy and procedures	- OPR - <u>non-OPR</u>	SO <u>SO</u>	5y <u>nil</u>	FR <u>DE</u>
-01	General				
-20	Access initiative case files (arrange by initiative)		CY+4y	5y	SR
	10y = The 10-year retention period allows sufficient time for the initiative to be completed, closed, abandoned or cancelled. It also provides sufficient time for research, consultation and reactivation of abandoned or cancelled initiatives. After 10 years access technologies will have changed.				

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A SA FD

15150 ACCESS INITIATIVES (continued)

SR = BC Archives will retain those access initiative case files that document significant projects designed to enhance public access to archival holdings. All other files classified under this secondary will be boxed separately and destroyed.

NOTE: This secondary covers the management of web-enabled access initiatives such as: SchoolNet, which developed the Amazing Time Machine that provides online access to British Columbia historical documents and images in a format designed for school-age children; the Cartographic Project, which put selected images of historical maps and related textual information online; and the Vital Statistics project, which developed online indexes to historic British Columbia birth, marriage and death registrations.

NOTE: The initiatives or projects that result from BRAT, PAG or other corporate access committees are classified under this secondary. All other records relating to these committees are classified under *ARCS* secondaries 202-20 or 204-20.

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A SA FD

15350 ACCESS REVIEW

Records relating to access restrictions, and to the review of relevant records in order to determine what access should be provided. Records may be restricted under the *Freedom of Information and Protection of Privacy Act (FOIPPA)* (RSBC 1996, c. 165) and other provincial and federal statutory restrictions (e.g., court records covering adoption, divorce, and related family relations matters are restricted under the *BC Supreme Court Rules*, and a variety of records are restricted under the federal *Young Offenders Act* [RSC 1985, c. Y-1]). In addition, non-government records may be restricted under conditions set by a private donor. Occasionally the government archives may apply restrictions 'in the public interest'.

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

NOTE: Access requests covered by *FOIPPA* are classified in *ARCS*. Access requests covered by other provincial and statutory restrictions, in addition to *FOIPPA*, are also classified in *ARCS* for administrative convenience. Secondary 15350-40 is used only for access requests not covered by *FOIPPA*

For access requests for records covered by *FOIPPA*, or *FOIPPA* and other legislation governing access, see *ARCS* secondaries 292-30 and 292-40.

For access restrictions on specific non-government accessions, see also the appropriate accession control record under secondary 13050-05 (for legacy accessions and descriptions), and/or accession file under secondary 12410-02.

For finding aid review, see *ARCS* secondary 292-20.

For research agreements, see relevant files classified under *ARCS* secondary 292-30 or 292-40, or under secondary 15350-40.

For tracking of all types of access requests, see *ARCS* secondary 292-02.

Unless otherwise specified below, the ministry OPR (Information and Privacy Section) will retain these records for:

CY+2y nil DE

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

SO nil DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
15350	<u>ACCESS REVIEW</u> (continued)				
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Access status report (also known as the access register)		SO	nil	DE
	NOTE: The access status report is generated for use by Access staff from a electronic table containing information drawn from the Records Review Register. The report lists boxes that contain records restricted under FOIPPA and other legislation or policy.				
-03	Records Review Register (electronic database)		SO	nil	FR
	SO = when no longer used to register access restrictions				
	FR = BC Archives will retain a paper printout of the final version of the Records Review Register because it documents the history of access restrictions to archival holdings. provides a history and inventory of access restrictions to the archival holdings.				
	NOTE: This database documents the access status of archival holdings that have received access reviews since 1999, when the database was created. Record review reports are generated from the database, signed by the IAS manager, and filed on the relevant access review case files (secondary -20).				
	The Access table that generates the secondary -02 reports is also classified under this secondary as it contains only information drawn from the Register.				
	Because the electronic register is a simple system created on a Microsoft Access database, an information system overview has not been created.				
-05	Index to research agreements (electronic records)		SO	nil	DE

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15350	<u>ACCESS REVIEW</u> (continued)			
	NOTE: The index to research agreements is a set of wordprocessing documents maintained for the use of Access Services staff, searchable by status (current or expired), researcher, or call number.			
-10	Information and Privacy statistical register (covers access requests not entered in the Corporate Request Tracking System [CRTS] which is maintained by Corporate Privacy and Information Access Branch) (arrange by year and then by date received)	CY+1y	nil	FR
	FR = BC Archives will fully retain the information and privacy statistical register because it documents the history of access provided to archival holdings for government staff under provisions of information and privacy legislation. Program staff will print a copy of each annual register and box it with other records for full retention.			
	NOTE: Non-CRTS access requests are received from ministries and other public bodies, and are filed in ARCS 292-30/40. However, they are arranged by ministry/public body name and then chronologically, rather than by request tracking code.			
-20	Access review case files (arrange by accession number or call number) (includes record review forms, research agreements, and severed versions of records)	SO	nil	SR
	SO = when no longer needed for reference purposes, or when all relevant information has been entered in the Records Review Register (secondary -03)			
	SR = BC Archives will retain those access review case files with information not entered in the Records Review Register. These files provide part of the history of access restrictions to the archival holdings. All other records covered by this secondary will be boxed separately and destroyed.			

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			<u>A</u>	<u>SA</u>	<u>FD</u>
15350	<u>ACCESS REVIEW</u> (continued)				
	NOTE: These files document the rationale behind the decision to open or restrict archival holdings at the file level, as well as BC Archives compliance with <i>FOIPPA</i> and other relevant legislation.				
PIB	-30 Access restrictions – private donors (includes permission letters) (arrange by name of researcher)		SO+6y	nil	DE
	OPR = Belleville central files				
	SO = when access to the information is either provided or denied, or when term of permission letter has expired				
	7y = The seven-year retention period ensures that researchers will have completed their research. It is based on the retention period for the access research agreements classified under secondary -40.				
	NOTE: This secondary covers permission letters obtained by researchers from private donors (individuals and organizations) to access their donations to the government archives. While this secondary covers all currently valid donor-imposed restrictions, others that have existed historically are documented in accession control records (secondary 13050-05) and in legacy documentation listed in Appendix A. Donor-imposed restrictions are routinely documented on accession files (secondary 12410-02).				
	NOTE: Non-OPR copies of all current access permission letters are retained in a binder in Access Services.				
	-35 Legacy restriction files (covers conservation restrictions and donor-required restrictions) (arrange by call number)		SO	nil	DE
	OPR = Access Services				
	SO = upon expiry of the access right or when the information is transferred to another record or format				

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A SA FD

15350 ACCESS REVIEW (continued)

NOTE: The main legacy restriction file is a card index that serves as a quick reference tool to access restrictions on government and non-government records covered by legacy access tools (ADI0037). No new cards are being added, but existing cards are annotated when appropriate. It is used in conjunction with the access status register classified under secondary -02. Access restrictions for newly described and acquired records are covered by the relevant access tools, as well as on ARIS and in relevant accession files. For other legacy restriction files, see Appendix A.

DE = These records can be destroyed when no longer active because restrictions are adequately documented in accession records and in access tools classified under primaries 12410 and 13050.

PIB	-40	Access requests not covered by <i>FOIPPA</i> (includes correspondence, access research agreements, resumes, research project descriptions, and copies of researchers' notes and drafts) (arrange chronologically)	SO+1y	5y	SR
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SO = when access to the information is either provided or denied, or when term of research agreement expires

6y = The six-year retention period is consistent with the retention period for access requests classified under *ARCS* secondary 292-30.

NOTE: Files are only opened under this secondary if the research request does not also include records covered by *FOIPPA*. They are similar to the files classified under *ARCS* secondaries 292-30 and -40, except that they do not relate to any records covered by *FOIPPA*. There are not many such files, primarily access requests to court records. See Appendix A for relevant legacy files. Access requests for judges' bench books are classified in secondary -45 for administrative convenience.

(continued on next page)

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

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15350	<u>ACCESS REVIEW</u> (continued)			
	NOTE: The non-OPR copy which is kept in Access Services is arranged by name of researcher, and therefore is a PIB.			
PIB	-45 Access requests – judges’ bench books (includes correspondence, research agreements, resumes, research project descriptions, and copies of researchers’ notes and drafts) (arrange chronologically)	SO+1y	5y	SR

SO = when access to the information is either provided or denied, or when term of research agreement expires

6y = The six-year retention period is consistent with the retention period for access requests classified under secondary -40 and *ARCS* secondary 292-30 .

NOTE: The non-OPR copy which is kept in Access Services is arranged by name of researcher, and therefore is a PIB.

SR = BC Archives will selectively retain access requests not covered by FOIPPA and access requests to judges’ bench books because they document the provision of access to sensitive non-government records in the archival holdings. When records become semi-active, program staff will identify significant and representative files and box them with other records for archival retention. All other files covered by this secondary will be boxed separately and destroyed.

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A SA FD

15420 INTELLECTUAL PROPERTY

Records relating to granting permission for use of BC Archives holdings for purposes other than personal research. Because these holdings are considered the intellectual property of the BC Government (that is, "intangible" property for which the government holds copyright, trademark, patents, industrial designs, or other moral rights), these permissions involve liaison with the Intellectual Property Program, a special operating agency of the provincial government. This program has a contract with a licensed agent which, when asked by the BC Archives, determines and manages user fees. Permissions fall into two categories: those given or refused by BC Archives (usually for cases where no significant profit is involved) and those referred to the licensed agent.

Researchers requesting archival materials that will be used for purposes other than research or their personal use must complete an application for permission form. Staff review the applications to determine whether or not a usage fee should be charged; whether or not the intended usage of the material is appropriate; and whether or not copyright (or other) restrictions apply.

The licensed agent sets the fees through discussion and negotiation with the applicant. The agent is paid by the applicant, and receives no funds from the provincial government or the BC Archives. BC Archives receives a royalty payment for the use of the material.

NOTE: BC Archives does not maintain financial records relating to fees charged by the agent.

Record types include correspondence, memoranda, and application for permission forms.

For reproduction orders, see primaries 14600 to 14680.
 For the research inquiries that result in permission requests, see secondaries 15480-20 and -30.
 For the royalty payment, see ARCS primary 1190.

Unless otherwise specified below, the ministry OPR (Belleville central files) will retain these records for: CY+2y nil DE

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

(continued on next page)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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			<u>A</u>	<u>SA</u>	<u>FD</u>
15420	<u>INTELLECTUAL PROPERTY</u> (continued)				
	-00 Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01 General				
	-02 Complaints and inquiries		SO	nil	DE
	-03 Intellectual property issues files		SO	nil	DE
	NOTE: This secondary also covers intellectual property concerns in other jurisdictions, previously covered by deleted primary 15430.				
	-04 Intellectual property program (includes correspondence and reference material)				
	-05 Licensed agent liaison		CY+2y	nil	FR
	FR = BC Archives will fully retain licensed agent liaison files because they document a unique arrangement in the history of the BC Archives, a partnership that BC Archives had with a commercial agent between 1997 and 2003.				
PIB	-20 Use permissions – BC Archives (covers application for permission forms which have been handled entirely by the BC Archives) (arrange by the first letter of the surname, then chronologically)		CY+3y	nil	FR
PIB	-25 Use permissions – licensed agent (covers application for permission forms, copies of which have been forwarded to the agent licensed to charge usage fees) (arrange by the first letter of the surname, then chronologically)		CY+5y	5y	FR
	FR = BC Archives will retain all BC Archives and licensed agent use permissions because they document specific uses of archival holdings, especially images, in publications and commercial products over time.				

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15420	<u>INTELLECTUAL PROPERTY</u> (continued)			
-35	BC Archives intellectual property initiatives (covers specific, ongoing initiatives, such as “salmon canning labels” and “Emily Carr products”) (arrange by initiative name and year of inception)	CY+2y	nil	FR
	FR = BC Archives will fully retain intellectual property initiatives case files because these files document significant and precedent-setting projects.			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15450	<u>OUTREACH AND VOLUNTEER ACTIVITIES</u>			
	Records relating to the planning and execution of activities aimed at raising the profile of the BC Archives in the community, and at encouraging community support of BC Archives programs and projects. Outreach activities include exhibits, open houses and other tours, coordinating volunteers, liaising with the Friends of the BC Archives, and other related activities.			
	Record types include correspondence, memoranda, working notes, minutes, and other record types as listed under relevant secondaries.			
	NOTE: One copy of each catalogue or other publication related to each exhibit, open house or tour should be placed on the relevant file classified under this primary.			
	For loan administration documentation relating to exhibits hosted by other agencies, see primary 15140. For online exhibits, see 15100-25. For volunteer program records relating to agreements, liability and insurance, responsibilities and obligations, work schedules, training, and individual volunteers, see ARCS primary 1775.			
	Unless otherwise specified below, the ministry OPR (Belleville central files) will retain these records for:	CY+2y	nil	DE
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	DE
-00	Policy and procedures			
	- OPR	SO	5y	FR
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	NOTE: File all outreach policy and procedures records under this secondary, including those relating to volunteers.			
-01	General			
-02	Friends of the BC Archives (includes minutes, correspondence, newsletters, membership lists, annual financial statements, paper versions of web pages, and related records)	SO	nil	SR
	SR = BC Archives will retain those Friends of the BC Archives files identified by program staff as significant because they document the role and activities of an			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15450	<u>OUTREACH AND VOLUNTEER ACTIVITIES</u> (continued)			
	important support group for the Archives. All other records covered by this secondary will be boxed separately and destroyed.			
-05	Tours (covers working notes, handouts, schedules, and correspondence)	SO+5y	nil	DE
-20	Exhibit files (includes floor-plans, maps, construction plans, research materials and designs) (arrange by exhibit or by event) (covers exhibits hosted or participated in by the BC Archives)	SO+5y	5y	SR
	SO = when an exhibit is dismantled or revised			
	10y = allows time for comparing previous exhibits and open houses with those under development			
	SR = BC Archives will retain the records of significant and precedent-setting exhibits because they document the manner in which the Archives has presented itself to the public over time. All other records covered by this secondary will be boxed separately and destroyed.			
	NOTE: Exhibit files document the initial design and development of each exhibit, its storyline and layout, signage, and environmental and security issues.			
-30	Open house case files (includes press releases, schedules, research materials and designs, exhibit records, and handouts) (arrange by date of open house) (covers open houses hosted or participated in by the BC Archives)	SO+5y	5y	FR
	SO = when the open house is over			

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15450	<u>OUTREACH AND VOLUNTEER ACTIVITIES</u> (continued)			
	FR = The BC Archives will fully retain open house case files because they document infrequent events in which there is high staff participation and significant interaction with the local community. Working notes and other routine documentation may be removed before records are boxed and sent off-site.			
-40	Outreach and volunteer project case files (includes project plans, working notes, and correspondence) (arrange by project type [such as events, volunteers, or Friends] and then by project name)	SO+3y	nil	SR

SO = when project is completed

SR = BC Archives will retain those outreach and volunteer project case files that document significant projects, that is, major projects, precedent-setting projects, and projects that document the holdings. All other records covered by this secondary will be boxed separately and destroyed.

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A SA FD

15480 REFERENCE SERVICES

Records relating to assisting with the research of BC Archives clients such as the provincial and federal governments, registered researchers, the general public, business, and the media. This research may be conducted through in-person visits to the BC Archives Reference Room, or through written requests (reference inquiries). Reference inquiries are requests for information about and copies of archival holdings, their contents, and related access issues.

Researchers making in-person visits begin by signing the security researcher log, and if it is the first visit in a calendar year, they also complete a researcher registration card. Reference staff enter the researcher's name in the researcher registration log, which generates a registration number that is recorded on the card and on a smaller version of the registration card that is issued for the researcher to carry. The researcher's card is shown to the security staff on each return visit, and the registration number is recorded in the security researcher log and on call slips. Assisted by reference staff, researchers use access tools and user guides to identify archival holdings relevant to their research topics, and request to see them by completing "call slips". If they wish to use holdings other than microfilm at times when reference staff are not available (evenings and weekends), they complete locker request forms so that items can be placed aside in a locker for them, and retrieved by security staff.

Reference inquiries received in writing are recorded in the reference inquiries log, and responded to by reference staff.

Record types include correspondence, memoranda, forms, call slips, register, cards, electronic log, and other types of records as indicated under relevant secondaries.

For reproduction orders, see primaries 14600 to 14680.

For retrieval and return request forms and way bills, see primary 12670.

For security records (such as research sign-in sheets, visitor logs relating to visitors with non-research purposes, and incident reports) see ARCS primary 470.

For usage statistics, see ARCS primaries 440 to 448.

For user guides, see primary 15100.

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

CY+2y nil DE

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			<u>A</u>	<u>SA</u>	<u>FD</u>
15480	<u>REFERENCE SERVICES</u> (continued)				
	Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	DE
	-00 Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
PIB	-01 General				
	-02 Reference inquiries log (also known as letter log) (electronic database)		SO	nil	DE
	NOTE: The reference inquiries log is generated by administrative staff from the main BC Archives correspondence log classified under ARCS secondary 255-30. The log is used as an index to the organizations and individuals who have sent research inquiries classified under secondaries -20 and -30.				
	-03 Reference inquiries statistical reports		SO	nil	FR
	FR = BC Archives will fully retain reference inquiries statistical reports because they document an important aspect of the history of research interest in the archival holdings, and of access services.				
	-05 Locker request forms (arrange chronologically)		3m	nil	DE
	3m = Three months is sufficient because locker request forms expire the day after they are issued. In addition, the information is duplicated on the call slips classified under secondary -07 and the security researcher logs classified under secondary -10.				
	-07 Call slips (i.e., retrieval requests) (arrange first by material type, then by date)		CY+1y	8y	DE

NOTE: Material types are practical categories such as "GR", "MS", "Lib", "Old Ms.", and "SMID".

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		<u>A</u>	<u>SA</u>	<u>FD</u>
15480	<u>REFERENCE SERVICES</u> (continued)			
	10y = allows time to discover that an item is missing and perhaps stolen, and to ensure that relevant researcher records can be checked			
	-08 Researcher registration log (arrange by registration number)	CY+1y	8y	DE
	10y = consistent with the retention period for registration cards classified under secondary -09, for which this log serves as an index			
PIB	-09 Researcher registration cards (arrange by surname)	CY+1y	8y	DE
	10y = consistent with the retention period for the call slips classified under secondary -07			
	-10 Security researcher logs (arrange chronologically)	CY+1y	8y	DE
	10y = consistent with the retention period for the call slips classified under secondary -07			
	NOTE: The security logs list the names and registration numbers of researchers and their time in and out on a given day. The logs are used to determine when a researcher was in the building, and to locate the relevant call slips.			
PIB	-20 Reference inquiry files (includes correspondence and attachments) (arrange by the first letter of the surname, then chronologically)	CY+1y	4y	SR
	OPR = Belleville central files			
	SR = BC Archives will retain all reference inquiry files opened before 1997, as well as significant and representative files opened since that time. These records document the history of access services provided for distant researchers, and research done by archivists on their			

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A SA FD

15480 REFERENCE SERVICES (continued)

behalf. Some of the archivists' correspondence and notes provide valuable documentation of archival holdings. Most post-1997 inquiry files reflect minimal research and do not provide significant information regarding holdings.

Significant files, if there are any, will be identified by a reference archivist. In addition, ca. 3 files (or ca. 5cm of folders) representing a different alphabetical range for each year will also be selected, to document the variety of requests received and replies to them. All other post-1997 files covered by this secondary will be boxed separately and destroyed.

NOTE: Copies of research requests for records with restrictions are also classified under primary 15350 or ARCS 292, as appropriate.

NOTE: Many of the pre-1997 reference inquiries are available in GR-1738 (1899-1979), accession 93-7991, and in legacy documentation of special media holdings (see Appendix A).

PIB	-40	Routine technical inquiries (includes the original letter of inquiry and the response) (arrange by the first letter of the surname, then chronologically)	CY+2y	nil	DE
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NOTE: Technical inquiries are requests for copies or information about: wills, probates, coroners records, newspaper clippings, vital events, obituaries, or company files. They may also include general requests for information about reference room procedures, hours, the access status of specific government or non-government records, or the location of records (off-site or on-site).

NOTE: Inquiries under secondaries -20 and -40 are filed by the first letter of the surname when the inquiry is a personal one, or the first letter of the first distinctive word in an organization's name when the inquiry is a corporate, institutional or government one (e.g., Ministry of Attorney General is filed under "A").

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**APPENDIX A
ARCHIVAL DOCUMENTATION INVENTORY (ADI)**

The Archival Documentation Inventory (ADI) is a descriptive inventory originally developed as part of a 1999 survey of all existing BC Archives accessioning systems and access tools, both active and closed. Most of these are identified as “legacy” systems and tools in secondary titles in Section 2 of this *ORCS*. Each legacy system identified was assigned a number beginning with the code “ADI” and a label with this number was placed on the container for the system. The inventory is classified under secondary 11000-03, and is fully retained. There may be additional legacy systems not yet added to the inventory.

As part of the 2001-2003 *ORCS* amendment project, ADI was reviewed and updated (some entries were previously incomplete, some access tools had been revised, and some new entries were added). *ORCS* secondary numbers were assigned, in some cases necessitating the addition of new secondaries to the *ORCS*. Some systems are covered by more than one *ORCS* secondary because they document more than one function or activity.

This appendix is intended to provide a reference tool for BC Archives staff using legacy systems and tools, and also to provide a concordance between the ADI and the *ORCS*. Please note that other than the RCS locations, all locations are at 655 Belleville.

ESSENTIAL: Update the location field of this is list whenever ADI tools are moved, and ensure Ref Room copy is up to date at all times.

ADI No.	ADI Title	ORCS 2ndary No.	Schedule	Location
PART 1	TEXTUAL RECORDS ENTRIES			
ADI0001	PABC Government records accession register, 1980-1981	12410-30	SO-nil-FR	Rm. 0067
ADI0002	PABC Government records accession register, 1982-1985	12410-30	SO-nil-FR	Rm. 0067
ADI0003	PABC Government records accession register, 1986-1993	12410-30	SO-nil-FR	Rm. 0067
ADI0004	Government records call number register, GR-0001 to GR-1677	12410-30	SO-nil-FR	Rm. 0067
ADI0005	Government records call number register, GR-1678 ongoing	12410-30	SO-nil-FR	Rm. 0067
ADI0006	Government records microfilm/microfiche Reference Room number register, vol. 1	14435-30	SO-nil-SR	Rm. 0067
ADI0007	Government records microfilm Reference Room number register, vol. 2	14435-30	SO-nil-SR	Rm. 0067
ADI0008	Union List of Manuscripts (ULM) register	11000-30	SO-nil-SR	Rm. 0067
ADI0009	Government records C series register	12410-30	SO-nil-FR	Rm. 0067

C-lab = conservation lab
IS = Imaging Services
map mez = map mezzanine

central = Belleville central files (main office)
LAN = Local Area Network (electronic)
Ref. Room = Reference Room

IPS = Information and Privacy Section
RCS = Records Centre Services (CRMB)
1/2/3rd fl st = 1/2/3rd floor stacks

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ADI0010	PABC Non-government records accession register, 1972-1974	12410-30	SO-nil-FR	Rm. 0067
ADI0011	PABC Non-government records accession register, 1975-1986	12410-30	SO-nil-FR	Rm. 0067
ADI0012	PABC Non-government records accession register, 1987-1991	12410-30	SO-nil-FR	Rm. 0067
ADI0013	Non-government records call number register, MS-0001 to MS-2469	12410-30	SO-nil-FR	Rm. 0067
ADI0014	Non-government records call number register, MS-2470 ongoing	12410-30	SO-nil-FR	Rm. 0067
ADI0015	Non-government records microfilm/microfiche Reference Room number register, vol. 1	14435-30	SO-nil-SR	Rm. 0067
ADI0016	Non-government records microfilm/microfiche Reference Room number register, vol. 2	14435-30	SO-nil-SR	Rm. 0067
ADI0017	Non-government records microfilm/microfiche Reference Room number register, vol. 3	14435-30	SO-nil-SR	Rm. 0067
ADI0018	Non-government records M series register	12410-30	SO-nil-FR	Rm. 0067
ADI0019	PABC Government and non-government records accession register, 1918-1941	12410-30	SO-nil-FR	Rm. 0067
ADI0020	PABC MS records accession register (WP copy of ADI0010-ADI0012)	12410-30	SO-nil-FR	Rm. 0067
ADI0021	PABC MS records accession register index, 1975-1984	12410-30	SO-nil-FR	Rm. 0067
ADI0022	PABC Non-government and government 74-A accession registration forms, 74-A-1 to 275	12410-30	SO-nil-FR	Rm. 109
ADI0023	PABC Non-government and government 74-A accession registration forms, 74-A-276 to 74-A-450	12410-30	SO-nil-FR	Rm. 109
ADI0024	PABC Non-government and government 74-A accession registration forms, 74-A-451 to 74-A-600	12410-30	SO-nil-FR	Rm. 109
ADI0025	PABC Non-government and government 74-A accession registration forms, 74-A-601 to 74-A-764	12410-30	SO-nil-FR	Rm. 109
ADI0026	PABC Non-government and government 74-A accession registration forms – Index	12410-30	SO-nil-FR	Rm. 109
ADI0027	PABC Non-government and government 74-A accession register – conversion list	13050-45	SO-nil-FR	Rm. 109

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ADI0028	Government records Accession Control Records (ACRs)	13050-05	SO-nil-FR	Rm. 0067
ADI0029	Non-government records Accession Control Records (ACRs)	13050-05	SO-nil-FR	Rm. 0067
ADI0030	GR shelf list cards (3 drawers)	13050-45	SO-nil-FR	3 rd fl st
ADI0031	MS shelf list cards (5 drawers)	13050-45	SO-nil-FR	3 rd fl st
ADI0032	Microforms shelf list cards	13050-45	SO-nil-FR	3 rd fl st
ADI0033	Old Manuscripts shelf list cards (5 drawers)	13050-45	SO-nil-FR	3 rd fl st
ADI0034	Old Manuscripts shelf list (removed cards, 1 drawer)	13050-45	SO-nil-FR	3 rd fl st
ADI0035	Old Manuscripts catalogue: shelf list of bound volumes (3 drawers of cards)	12520-03	SO+1y-nil-DE	3 rd fl st
ADI0036	Non-government and government restriction cards by expiry date (1 drawer)	15350-35	SO-nil-DE	3 rd fl st
ADI0037	Non-government and government restriction cards by call number (1 drawer)	15350-35	SO-nil-DE	3 rd fl st
ADI0038	Recommendation for further description/conservation work cards (1 drawer)	13000-25, 14120-30, 14260-03	SO-nil-DE SO-nil-FR SO-nil-SR	3 rd fl st
ADI0039	Conservation recommendation cards (1 drawer)	14120-30	SO-nil-FR	3 rd fl st
ADI0040	Donor files (1 drawer of cards)	12830-14	SO-nil-FR	3 rd fl st
ADI0041	Old Manuscript catalogue: cards removed from main catalogue (5 drawers)	13050-45	SO-nil-FR	3 rd fl st
ADI0042	GR finding aids – information and privacy copy	13050-45	SO-nil-FR	IPS
ADI0043	MS finding aids – information and privacy copy	13050-45	SO-nil-FR	IPS
ADI0044	Department guides/inventories (blue binders), information and privacy copy	13050-03	SO-nil-FR	IPS
ADI0045	GR finding aids (Reference Room copy)	13050-45	SO-nil-FR	Rm. 0070
ADI0046	MS finding aids (Reference Room copy)	13050-45	SO-nil-FR	Rm. 0070
ADI0047	GR and MS card catalogue	13050-45	SO-nil-FR	Rm. 0070
ADI0048	Government records and historical manuscripts card catalogue, pre-1975 (“Old Manuscript Catalogue”)	13050-45	SO-nil-FR	Rm. 0070
ADI0049	Colonial correspondence (GR1372) index (45-drawer card cabinet)	13050-45	SO-nil-FR	Rm. 0070
ADI0050	Department guides/inventories (blue binders), Reference Room copy	13050-03	SO-nil-SR (non-OPR)	Ref. Room

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ADI0051	WP version of GR and MS catalogue cards	13050-45	SO-nil-FR	LAN
ADI0052	WP version of GR and MS file lists ("finding aids")	13050-45	SO-nil-FR	LAN
ADI0053	Location control register (paper and WP)	12520-03	SO+1y-nil-DE	Rm. 0067 & Rm. 005
ADI0054	"Old Manuscript Catalogue" classification system documentation (1 binder)	13000-05	SO-nil-SR	Ref. Room (bridge)
ADI0055	Archives correspondence files/PABC correspondence, part 1 (GR-1738)	15480-20 & 12836-14	CY+1y-4y-SR SO-nil-FR	4 th fl st
ADI0056	Archives correspondence files/PABC correspondence, part 2 (3 accessions)	15480-20 & 12830-14	CY+1y-4y-SR SO-nil-FR	3 rd fl st
ADI0057	Donor correspondence/Record of Gift files	12830-14	SO-nil-FR	3 rd fl st
ADI0058	Temporary receipts for archival donations	12830-14	SO-nil-FR	3 rd fl st
ADI0059	Taxation appraisal and certification files	12900-20	CY+10-nil-FR	central
ADI0060	Department guides/inventories (blue binders), third copy	13050-03	SO-nil-SR	3 rd fl st
PART 2	SOUND AND MOVING IMAGE ENTRIES			
ADI0101	Sound and Moving Image donor/source file (1 drawer of cards)	12830-14	SO-nil-FR	Rm. 3B
ADI0102	Sound and Moving Image Name and Subject Authority File (2 drawers of cards)	13150-08	SO-nil-FR	Rm. 112
ADI0103	Missing or de-accessioned Sound and Moving Image records (1 box of cards)	12830-08/ 12520-04	CY+2y-5y-FR SO-2y-DE	Rm. 112
ADI0104	Sound and Moving Image research files (28 boxes)	13200-25, 13200-50	SO-nil-SR SO-nil-SR	3 rd fl st
ADI0111	Sound tape accession register (3 original registers, 2 binders with reference copies)	12410-30	SO-nil-FR	Rm. 3B & map mez
ADI0112	Interviewee collection log (mainly re. sound recordings of political interviewees) (1 bound volume)	13050-60	SO-nil-FR	Rm. 3B
ADI0113	Sound tape shelf list (2 drawers of cards)	12520-03	SO+1y-nil-DE	Rm. 112
ADI0114	Potential oral history interviewees (1 box of cards)	13200-50	SO-nil-SR	Rm. 3B
ADI0115	Sound tape creators/interviewers: Alphabetical list for tapes 1-3311 (1 drawer of cards)	13200-25	SO-nil-SR	Rm. 3B
ADI0116	Sound recording restrictions file (1 drawer of cards)	15350-35	SO-nil-DE	Rm. 3B

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ADI0117	Oral history interviewees: alphabetical index (6 drawers of cards)	13050-60	SO-nil-FR	Rm. 3B
ADI0118	Sound tape accession documentation files (121 boxes)	13050-60	SO-nil-FR	3 rd fl st
ADI0119	BC Legislative Assembly Hansard recordings: sound tape log books, 1970-1982 (6 boxes)	13050-60	SO-nil-FR	3 rd fl st
ADI0120	Aural history tape catalogue: numerical list (3 binders of computer printouts)	13050-60	SO-nil-FR	Ref. Room
ADI0121	Aural history tape catalogue: subject/interviewee index (1 binder of computer printouts)	13050-60	SO-nil-FR	Ref. Room
ADI0122	Aural history tape catalogue: interviewee list (alphabetical) (several versions with overlapping contents)	13050-60	SO-nil-FR	Location unknown
ADI0123	Sound recordings name, title, and subject index (card catalogue)	13050-60	SO-nil-FR	Ref. Room
ADI0125	Sound tape holdings finding aids (binders and duo-tang folders)	13050-60	SO-nil-FR	Ref. Room
ADI0126	<i>Principal Oral History Collections</i> (published guide – annotated, with WANG document supplement)	13050-60	SO-nil-FR	3 rd fl st
ADI0131	Sound disc accession register (1981-1993) (1 volume)	12410-30	SO-nil-FR	Rm. 3B
ADI0132	Sound disc call numbers catalogue (also contains sample entries for films and videos) (1 drawer of cards currently titled “Shelf List: Discs/Films/Videos”)	13050-60	SO-nil-FR	Rm. 112
ADI0133	Radio broadcasts on sound discs: subject/source index (1 drawer of cards)	13050-60	SO-nil-FR	Rm. 3B
ADI0134	Sound disc accession documentation files (3 boxes)	13050-60 12830-14	SO-nil-FR SO-nil-FR	3 rd fl st
ADI0135	Sound disc finding aids (binders)	13050-60	SO-nil-FR	Ref. Room
ADI0151	Film accession/call number register, F1980-onwards (1 drawer of flimsies)	12410-30 13050-60	SO-nil-FR SO-nil-FR	Location unknown
ADI0152	Film and video title index (4 drawers of cards)	13050-60	SO-nil-FR	3 rd fl st
ADI0153	Film accession documentation files (20 boxes)	13050-60 12830-14	SO-nil-FR SO-nil-FR	3 rd fl st
ADI0154	Film collection finding aids, 1980-1993 (binders and duo-tang folders)	13050-60	SO-nil-FR	Ref. Room

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ADI0155	<i>Motion Picture Production in British Columbia, 1898-1940</i> ("Browne filmography") Part 1: annotated authority copy (1 volume)	13050-60	SO-nil-FR	3 rd fl st
ADI0156	<i>Camera West: British Columbia on Film, 1941-1965</i> Part 1: annotated authority copy (1 volume)	13050-60	SO-nil-FR	3 rd fl st
ADI0157	<i>Motion Picture Production in British Columbia, 1898-1940</i> ("Browne filmography") Part 2: update binder	13050-60	SO-nil-FR	3 rd fl st
ADI0158	<i>Camera West: British Columbia on Film, 1941-1965</i> Part 2: update binder	13050-60	SO-nil-FR	3 rd fl st
ADI0159	SMI client reference requests binder	15480-40	SO+1y-5y-SR	3 rd fl st
ADI0160	SMI Restricted materials access agreements, 1981-1997 (1 binder)	15350-40	SO+1y-5y-SR	Rm. 3B
ADI0161	Film and video catalogue collection (FCAT) (10 boxes of published materials)	13200-40	SO-nil-FR	3 rd fl st
ADI0162	Film and video catalogue index (1 box of cards)	13050-60	SO-nil-FR	3 rd fl st
ADI0163	Deaccessioned moving images list (1 drawer)	12830-08	CY+2y-5y-FR	Rm. 3B
ADI0171	Videotape accession register, V1980-onwards (1 drawer of flimsies)	12410-30	SO-nil-FR	Rm. 3B
ADI0172	Videotape accession documentation files (11 boxes)	13050-60 12830-14	SO-nil-FR SO-nil-FR	3 rd fl st
ADI0173	Videotape finding aids, 1980-1993 (binders and duo-tang folders)	13050-60	SO-nil-FR	Ref. Room
ADI0191	BC Music Collection (commercial audio recordings): subject/title index (2 drawers of cards)	13050-60	SO-nil-FR	Rm. 3B
ADI0192	BC Music Collection (commercial audio recordings): performer/composer index (2 drawers of cards)	13050-60	SO-nil-FR	Rm. 3B
ADI0193	BC Music Collection want list (by performer) (1 drawer of cards)	13200-50	SO-nil-SR	Rm. 3B
ADI0194	Phonographic record distributors list (1 drawer of cards)	13200-50	SO-nil-SR	Rm. 3B
PART 3	NAME/SUBJECT AUTHORITY ENTRIES			
ADI0201	Central name authority file (CNAF) (65 drawers of cards)	13150-04	SO-nil-FR	3 rd fl st

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ADI0202	Additional local subject headings (1 drawer of cards)	13150-08	SO-nil-FR	3 rd fl st
ADI0203	Library of Congress subject headings (annotated) (4 vols.)	13150-08	SO-nil-FR	Ref. Room
PART 4	VISUAL RECORDS ENTRIES			
ADI0301	Photographs documentation project 19??-1997: original images databases (feeder databases) NOTE: no longer exists (JRD, 2003/05/02)	13000-20	SO-nil-DE	LAN
ADI0302	Photographs documentation project 19??-1997: working images databases NOTE: no longer exists (JRD, 2003/05/02)	13000-20	SO-nil-DE	LAN
ADI0303	Photographs documentation: master table database (for descriptions of images in the online Visual Records Index)	13050-70	SO-nil-SR	LAN
ADI0304	See Preservation Entries below			
ADI0305	Old master inventory database NOTE: no longer exists (JRD, 2003/05/02)	12520-03	SO+1y-nil-DE	LAN
ADI0306	See Preservation Entries below			
ADI0307	Legacy photograph accession register (16 binders, 1 database)	12410-07	SO-nil-FR	LAN & Rm. 0067
ADI0308	Visual Records Division "Old Gift File" (photographs) (2 drawers of cards)	12410-30	SO-nil-FR	Rm. 005
ADI0309	Paintings, Drawings and Prints accession records (16 drawers of files)	12410-30	SO-nil-FR	Rm. 003A
ADI0310	Historical Photograph (HP) accession register, 1935 on (17 volumes)	12410-30	SO-nil-FR	Rm. 110
ADI0311	Visual Records Division accession records for photographs acquired pre-1988 ("Manual Accession Registers") (15 binders of forms)	12410-30	SO-nil-FR	Rm. 005
ADI0312	Visual Records Division accession records for photographs: "A files" (3 drawers of files)	12410-30 & 12830-14	SO-nil-FR SO-nil-FR	Rm. 005
ADI0313	Photographs donor index, non-government donors ("Source files") (3? drawers of cards)	12830-14	SO-nil-FR	Rm. 005
ADI0314	Photographs donor index, government donors ("Source files") (1 drawer of cards)	12830-14	SO-nil-FR	Rm. 005
ADI0315	Photographs donor index, unknown provenance ("Source files") (1 drawer of cards)	12830-14	SO-nil-FR	Rm. 005

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ADI0316	Paintings, Drawings and Prints donor index ("Source file") (1 drawer of cards)	12830-14	SO-nil-FR	Rm. 005
ADI0317	Photographers and artists reference files (9 drawers of files – 3 for photographers, 6 for artists)	13200-30	SO-nil-FR	Rm. 005 & Rm. 003A
ADI0318	Outdated PDP location cards (3 drawers of paper slips)	12520-03	SO+1y-nil-DE	Rm. 005
PART 5	MAPS AND PLANS ENTRIES			
ADI0401	Maps and plans accession book No. 1 Acc. Nos. 101-5610	12410-30	SO-nil-FR	Map mez
ADI0402	Maps and plans accession book No. 2 Acc. No. 5611-10890	12410-30	SO-nil-FR	Map mez
ADI0403	Maps and plans registration slips: preliminary title listings (1 drawer)	12410-30	SO-nil-FR	Map mez
ADI0404	Maps and plans registration cards, Acc. Nos. 10,891 - 19,434 (2 drawers)	12410-30	SO-nil-FR	Map mez
ADI0405	Maps and plans acquisition files 1974, 1979-1982 (17 files)	12410-30 &12830-14	SO-nil-FR SO-nil-FR	Map mez
ADI0406	Map "M" accession record forms, 1984-1988	12410-30	SO-nil-FR	Map mez
ADI0407	Map "M" accession record forms, 1988-1989	12410-30	SO-nil-FR	Map mez
ADI0408	Map "M" accession record forms, 1989-1991 (in same binder as ADI0411)	12410-30	SO-nil-FR	Map mez
ADI0409	Map "M" accession records: files of supplementary documentation (1 drawer)	12410-30	SO-nil-FR	Map mez
ADI0410	Maps and plans donor source cards, 1984-1991 (2 drawers)	12830-14	SO-nil-FR	Map mez
ADI0411	Maps and plans donor records: unprocessed preliminary forms, 1989-1991 (in same binder as ADI0408)	12830-14	SO-nil-FR	Map mez
ADI0412	Register of maps transferred to Maps and Plans Unit from other archival media units	13000-05	SO-nil-SR	LAN
ADI0413	Legacy map accession files and/or legacy access tools	12410-30 & 13050-40	SO-nil-FR SO-nil-FR	Map mez (file cab & shelf)
ADI0414	Map program location register and call numbers concordance listing (binder and WP documents)	12520-04 13000-05	SO-2y-DE SO-nil-SR	1 st fl st, Rm. 005, (& LAN?)
ADI0415	BCARS map program location register (partial copy of ADI0414) (duotang binder)	12520-04	SO-2y-DE	Rm. 005?

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ADI0416	Off-site maps location guide (brown duo-tang folder)	12520-04	SO-2y-DE	Rm. 0067
ADI0417	Map call number conversion list (4 copies exist: 2 green reference room binders, 1 blue Map Room folder, and 1 WP "master" document)	13000-05	SO-nil-SR	LAN, Rm. 0067, & Ref. Room
ADI0418	Register of maps on 105mm, part 1: call number order (map room binder); part 2: negative number order (reference room binder)	14435-30	SO-nil-SR	Rm. 0067 & Ref. Room
ADI0419	Old map descriptive systems catalogue, part 1: reference room version (30 drawers of cards); part 2: shelf list version (5 drawers of cards)	13050-40	SO-nil-FR	Rm. 005 & Ref. Room
ADI0420	Archival holdings that accompany map accessions ("accompanying materials files") (41 folders) NOTE: these are the old numbered correspondence files.	12950-20	SO-nil-FR	Map mez file cab & PSU by west stairs base
ADI0421	Architects cards (1 drawer of cards)	13200-20	SO-nil-FR	Rm. 005
ADI0422	Public works plans register (1 drawer of slips)	13050-40	SO-nil-FR	1 st fl st (near Ref Rm door)
ADI0423	Fire insurance plans inventory (WP document, 1 drawer of cards with working notes)	13050-40	SO-nil-FR	LAN & Rm. 005
ADI0424	"New" (CM number) map catalogue (1 card catalogue cabinet and 12 drawers of shelf list cards)	13050-40	SO-nil-FR	Rm. 005 & Ref. Room
ADI0425	Map access tools by CM number ("additional finding aids") (duo-tang folders)	13050-40	SO-nil-FR	Ref. Room
ADI0426	Water rights plans access tools, CM/S5-S7 (binder)	13050-40	SO-nil-FR	Map mez (cabinet)
ADI0427	Register of uncatalogued "A" series maps (database)	13050-40	SO-nil-FR	LAN
ADI0428	Map reference manual	15480-00 & 13050-40	SO-5y-FR SO-nil-FR	Ref Room (bridge)
ADI0429	Creator/source-based working notes on maps in old map catalogue (ADI0419), "CM/Z files" (14 folders)	13200-50	SO-nil-SR	Map mez

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ADI0430	Map program subject files, part 1: 1966-1989 (1 drawer of folders)	12410-30 & 12830-14 & 13200-50 14120-30	SO-nil-FR SO-nil-FR SO-nil-SR SO-nil-FR	Map mez
ADI0431	Library and maps section file register, closed and annotated in 1989 (1 binder)	13200-50	SO-nil-SR	Map mez
ADI0432	Map donor/source documentation for 1979-1984 accessions (not complete) (ca. 50 forms/sheets bulldog-clipped together)	12830-14	SO-nil-FR	Map mez
ADI0433	Uncatalogued maps and plans list 197-? (1 binder)	13000-20	SO-nil-DE	Map mez
ADI0434	Uncatalogued maps and plans location list (outdated) (1 duo-tang folder)	12520-03	SO+1y-nil-DE	Map mez
ADI0435	Map "CM" system call number register, 1979-ongoing (1 duo-tang folder)	13050-40	SO-nil-FR	Map mez
ADI0436	Map item level registration number register, 1979?-ongoing (1 binder)	12410-30	SO-nil-FR	Map mez
ADI0437	Map program subject files, part 2: 1989-1995 (1 drawer of files)	12000-00 & 13200-50 & 14120-30 & 15480-20	SO-5y-FR SO-nil-SR SO-nil-FR CY+1y-4y-SR	Map mez
ADI0438	Map agency/series finding aid development files (1 drawer of files)	13200-50	SO-nil-SR	Map mez
ADI0439	Belleville map location list, by call number, ca. 1992 (1 duo-tang folder) (same as ADI0414)	12520-03	SO+1y-nil-DE	Rm. 005
ADI0440	Bib-base bibliographic records for published (NW) and unpublished (CM) maps	13050-04 & 13050-40	SO-nil-FR SO-nil-FR	LAN
PART 6	PRESERVATION ENTRIES			
ADI0304	Preservation management and location control database (Preservation Database)	13900-20	SO-nil-DE	LAN
ADI0306	Preservation management and location control database: auxiliary databases	12520-03	SO+1y-nil-DE	LAN
ADI0501	Condition/treatment reports: condition master database and worksheets (not labelled with ADI no.)	14120-20	SO-nil-FR	LAN & C-lab
ADI0502	Condition/treatment reports: master negatives condition project database NOTE: worksheets have been dispersed.	14120-20	SO-nil-FR	LAN

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ADI0503	Condition/treatment reports: films condition project database NOTE: worksheets have been dispersed.	14120-20	SO-nil-FR	LAN
ADI0504	Condition/treatment reports: vinegar syndrome condition testing project database NOTE: worksheets have been dispersed.	14120-20	SO-nil-FR	C-lab
ADI0505	Condition/treatment report files	14120-20	SO-nil-FR	C-lab
ADI0506	Condition/treatment report "Before and after" documentation slide binders (ca. 13 binders)	14120-20	SO-nil-FR	C-lab
PART 7	RECORDS CENTRE SERVICES ENTRIES			
ADI0601	RCS Accession Register, vol. 1	12410-04	SO-nil-FR	RCS
ADI0602	RCS Accession Register, vol. 2	12410-04	SO-nil-FR	RCS
ADI0603	RCS Accession Register, vol. 3	12410-04	SO-nil-FR	RCS
ADI0604	RCS Accession Register, vol. 4	12410-04	SO-nil-FR	RCS
ADI0605	RCS Accession Register, vol. 5	12410-04	SO-nil-FR	RCS
ADI0606	RCS Accession Register, vol. 6	12410-04	SO-nil-FR	RCS
ADI0607	RCS Accession Register, vol. 7	12410-04	SO-nil-FR	RCS
ADI0608	RCS Accession Register, vol. 8	12410-04	SO-nil-FR	RCS
ADI0609	RCS Accession Register, vol. 9	12410-04	SO-nil-FR	RCS
ADI0610	PABC Schedule Appraisal Tracking Register, 1981-1984 (84-0001 – 84-0423)	12830-19	SO-nil-FR	RCS
ADI0611	PABC Schedule Appraisal Tracking Register, 1985-1986 (85-0001 – 86-0853)	12830-19	SO-nil-FR	RCS
ADI0612	PABC Schedule Appraisal Tracking Register, 1987-1988 (87-0001 – 88-1374)	12830-19	SO-nil-FR	RCS
ADI0613	PABC Ongoing Records Schedule Appraisal Tracking Register	12830-19	SO-nil-FR	RCS
ADI0614	Retention and Disposition Schedule Register, vol. 1	12830-19	SO-nil-FR	RCS
ADI0615	Retention and Disposition Schedule Register, vol. 2	12830-19	SO-nil-FR	RCS
ADI0616	Retention and Disposition Schedule Register, vol. 3	12830-19	SO-nil-FR	RCS
ADI0617	Retention and Disposition Schedule Register, vol. 4	12830-19	SO-nil-FR	RCS
ADI0618	Retention and Disposition Schedule Register, vol. 5	12830-19	SO-nil-FR	RCS

C-lab = conservation lab
IS = Imaging Services
map mez = map mezzanine

central = Belleville central files (main office)
LAN = Local Area Network (electronic)
Ref. Room = Reference Room

IPS = Information and Privacy Section
RCS = Records Centre Services (CRMB)
1/2/3rd fl st = 1/2/3rd floor stacks

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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ADI0619	Retention and Disposition Schedule Register, vol. 6	12830-19	SO-nil-FR	RCS
ADI0620	Retention and Disposition Schedule Register, vol. 7	12830-19	SO-nil-FR	RCS
ADI0621	Retention and Disposition Schedule Register, vol. 8	12830-19	SO-nil-FR	RCS
ADI0622	Retention and Disposition Schedule Register, vol. 9	12830-19	SO-nil-FR	RCS
ADI0623	Retention and Disposition Schedule Register, vol. 10	12830-19	SO-nil-FR	RCS
ADI0624	Retention and Disposition Schedule Register, vol. 11	12830-19	SO-nil-FR	RCS
ADI0625	Retention and Disposition Schedule Register, vol. 12	12830-19	SO-nil-FR	RCS
ADI0626	Retention and Disposition Schedule Register, vol. 13	12830-19	SO-nil-FR	RCS
ADI0627	Retention and Disposition Register for Ongoing Records Schedules, 1984-1986	12830-19	SO-nil-FR	RCS
ADI0628	RCS Disposition Register, vol. 1 (1985-1989)	12430-06	SO-nil-FR	RCS
ADI0629	RCS Disposition Register, vol. 2 (1989-1992)	12430-06	SO-nil-FR	RCS
ADI0630	RCS Disposition Register, vol. 3 (1989-1992)	12430-06	SO-nil-FR	RCS
ADI0631	Records Series Inventory Number (RSIN) Register, vol. 1	12410-04	SO-nil-FR	RCS
ADI0632	Records Series Inventory Number (RSIN) Register, vol. 2	12410-04	SO-nil-FR	RCS
ADI0633	Records Series Inventory Number (RSIN) Register, vol. 3	12410-04	SO-nil-FR	RCS

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APPENDIX B
Summary of Changes to the approved *British Columbia Archives and Records (BCARS) ORCS*

Primary	Title	Type of Change	Comments
All	Default retention period	Reduced from CY+1y/4y/DE to CY+2y/nil/DE (Except primary 14600)	Satisfies current requirements.
All	-02 Standards Reserved secondary	Deleted	Not used, and covered by -00.
All	OPR	BC Archives, and then depending on the primary: <ul style="list-style-type: none"> - Access Services - Belleville central files - Emerging and Applied Information Technologies Group (EAIT) - Imaging Services - Information Management Systems and Planning - Information and Privacy Section - Records Centre Services - Yates central files 	
All	Section title pages	Revised	
Relevant primaries	NOTE: referring to Appendix A – Archival Documentation Review (1999)	In relevant primaries, a standard NOTE has been added referring to Appendix A , which contains a summary list of the legacy and current archival documentation included in the <i>Archival Documentation Review (1999) (ADI)</i> .	
Relevant primaries	Cross-references to ARIS		
Relevant primaries	Record types updated and reformatted to current standard		
11000	Archives and Information Management - General	Primary title Scope note New secondaries: -02, -03, -05, -20, -25 and -30 Deleted Glossaries (secondary -03) and used for ADI	-02 covers deleted primaries 11040-11160 -03 covers the Archival Documentation Inventory, -05 – reports and studies -23 covers grants BC Archives applies for -20 covers ARIS -25 covers CRM web site -30 covers national/international projects

APPENDIX B
Summary of Changes to the approved *British Columbia Archives and Records (BCARS) ORCS*

Primary	Title	Type of Change	Comments
11020	Cost-Benefit Analysis	Deleted	Not used
11040 to 11160	Jurisdictions	Deleted, and merged into secondary 11000-02. Changed retention period.	Hardly used. Covered by 11000-02. New retention is SO/nil/DE.
11240	Studies and Reports	Deleted	Not used
11300	Policy and Planning – General	Deleted	Not used
11330	Policy - General	Deleted	Now covered by primary 11370
11350	Policy - Documentation Standards	Deleted	Now covered by secondary 11370-30
11370	Policy - Development	Primary title Scope note Cross-references -03, -05, -30, -40 new -20 changed	-03 covers corporate (external) policy -05 covers policy registers -20 covers corporate policy development -30 covers internal policy development -40 covers documentation standards development
11400	Policy - Manuals	Deleted	Covered by ARCS 195-30. Approved internal policies or standards specific to the subject of a primary are classified in secondary-00 under the appropriate primary. Internal and corporate policy development files and approved corporate policies are classified under primary 11370.
11420	Planning	Deleted	Covered by ARCS 400-20
11500 - 11650	Records Creation and Maintenance	Deleted	Not used –
11690	Vital Records	Deleted –	Hardly used - Client vital records plans should be filed in primary 14150
11800 to 11860	Advisory Services	Deleted 11800 to 11840 11860 changed scope note, added cross-references, changed -30 into -02, and created new secondaries for -20, -30 and -40.	11800 to 11840 hardly used 11860-20 covers all routine advice to clients 11860-30 covers significant advice 11860-40 covers program review, which was covered by deleted primary 12190

APPENDIX B
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Primary	Title	Type of Change	Comments
11900	Community Archives – General	Scope note New secondaries -02 and -03, and new retention	-02 covers -20 and -30 from deleted primary 11940 -03 covers -03 and -04 from deleted primary 11940 Changed retention for these secondaries to SO/nil/DE
11920	Community Archives - British Columbia Archival Network	Primary title Scope note Cross-references -02, -03, -04, -05 deleted -20 revised -30 turned into two new secondaries -30 and -35	--02, 03 Not used -04 Covered by new 11920-30 -05 Covered by new 11900-03 -20 Changed title, added qualifiers, changed retention and wrote FR statement -30 Created two secondaries, changed titles, added qualifiers, changed retention and wrote SR statements
11940	Community Archives - Other Jurisdictions	Deleted	Not used. Now covered by secondaries 11900-02 and -03.
11950	Community Archives - Programs and Grants	Primary title Scope note Cross-references -02 new -03 deleted, not used -04 revised -05 revised -06 changed -20 expanded -30 deleted, not used	-02 now covers Archives Grants Review Committee --04- changed title, retention and final disposition -05 changed to cover reports -06 now covers grants register -20 changed title, retention and final disposition
11980	Legislative Assembly	Deleted	Not used. Information is on accession files 12410-02 or application files 12830-03
12000	Electronic Information Management Research	New Primary	
12100	Records System Implementation and Review - General	Deleted	Not used

APPENDIX B
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Primary	Title	Type of Change	Comments
12140	Client Projects	Deleted	Now covered by secondaries 11860-20 and -30
12160	Community Archives Program Review	Deleted	Not used
12190	Information Management Program Review	Deleted	Not used. Now covered by secondary 11860-40
12400	Records Control and Disposition Services – General	Slight change to primary title and scope note -05, -20 new secondaries	-20 covers storage facility contract files since these require a longer retention than scheduled in ARCS. -05 covers Storage chargeback reports NOTE: Corporate policies (e.g. ARS 517 guidelines) are filed in –00. During implementation these should be re-classified to primary 11370.
12405	Records Control and Disposition Services - Other Jurisdictions	Deleted	Not used. Now covered by secondary 11000-02
12410	Accession Control	Scope note, record types	
12410-02	Accession files	Modified retention period by deleting 10y semi-active NOTE added which lists forms Expanded on SO	10y semi-active not required, final disposition is FR
12410-03	Standards	Replaced with new secondary for access authorizations	New secondary -03
12410-04	Records Centre Services accession registers	Reduced retention period by deleting 10y semi-active Expanded on SO Used the FR statement under 121410-02 Added a NOTES	
12410-05	Records transfer location lists returned	Deleted	Not used

APPENDIX B
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Primary	Title	Type of Change	Comments
12410-06	Ongoing accession number assignment	Changed title slightly Reduced retention Explained retention and DE Added a NOTE	
12410-07	New secondary	Legacy photograph register	
12410-08	New secondary	Records transfer reports	
12410-21	ARIS source records	Deleted	Not used
12410-30	Old format accession files - all media	Title – now Legacy accession files – all media Added qualifier SO statement FR statement NOTES Provided for microfilming of paper files Deleted electronic database	NOTE x ref to 12950 for microfilmed records
12420	Disposition - General	Deleted	Not used
12430	Disposition - Control	Scope note Secondary -02 for reports that were covered by -30 and -40 Deleted -03 and -04. Not used -06 added to title, revised SO statement, NOTE, and included the FR statement -20 title change, FR statement included, and NOTE added -30 and -40 deleted and moved to -02.	-07 currently not used, however, during implementation these records should be transferred from the ARCS contract files where they are currently kept, to this secondary.
12450	Disposition - Recycling	Deleted	Not used
12490	Facilities and Services	Scope note Retention period Added to secondaries -03, -04, -05, -07 -06 changed	-06 not used, replaced by 'proposed pick-up reports'

APPENDIX B
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Primary	Title	Type of Change	Comments
12520	Location Control	Scope note Cross-reference -04 title change and qualifiers added, SO statement, final disposition, and NOTE changed Deleted -05	-SO now explains that the file is closed when items have been located or documentation is placed on the 12410-02 (accession) file. Disposition changed to DE -05 moved to 13050-10, retention and disposition changed
12570	Retrieval and Use Controls - General	Small change to title and scope note	
12630	Microfilm Vault	Scope note Cross references Deleted -04 and -05 and replaced with new secondaries -02 and -05 -06 title change	-04 and -05 were not used -02 now covers the indexes, which were included under 12520-03 -05 now covers vault retrieval forms -06 – covers projects and plans (formerly just conversion)
12670	Storage Facility	Scope note Cross-references -03 deleted; now on ARIS -04 deleted; not used -05 deleted; not used -06 changed title; retention period -07 new secondary	
12700	Classification and Schedule Design - General	Scope note – extensive revision Cross-references added	
12720	Administrative Records Classification System	Scope note Cross-references -02 new secondary -03 changed title, changed retention period and final disposition -05 new secondary -06 new secondary -20 changed title, arrange qualifier, and SO -30 changed title and notes -40 deleted, covered by 11860	

APPENDIX B
Summary of Changes to the approved *British Columbia Archives and Records (BCARS) ORCS*

Primary	Title	Type of Change	Comments
		-50 deleted and included in secondaries -20 and new -25	
12740	Issues	Deleted	Covered by new primary 11860
12760	Operational Records Classification Systems	Scope note Cross-references -20 slight change to title -30 new secondary	-30 covers documents relating to systems which have been scheduled for archival retention NOTE: -02 standards formerly used to cover the ORCS Kit which is now classified in 11370-03
12780	Records Inventories and Surveys	Deleted	Not used
12790	Special Government-Wide Ongoing Records Schedules	Slight change to title Scope note Cross-references -20 slight change to title	
12800	Appraisal, Selection and Acquisition- General	Slight change to title Scope note Added cross-references -02 new secondary covering primaries 12840 to 12850 and 12950 to 12960 -10 new secondary	-10 covers appraisal and selection projects
12810	Acquisition Policy	Deleted	Not used
12820	Appraisal and Acquisition - General	Deleted, and NOTE below secondary -01 moved below 12830-01	Not used, except for secondary -01. Now covered by 12830-01. The -01 files should be reclassified under a more appropriate 2ndary – probably 12830-14.
12830	Appraisal and Acquisition - Authorities	Primary Title Scope Cross-reference -01 NOTE -02 new secondary for reports that were under secondaries -30 and -35 -03 added qualifiers, changed retention by deleting 5y semi-active, changed SO and FR statements slightly, provided for microfilming of	-04 former title of secondary was Alienation of government records, new title is Permanent transfer requests. Some old 12895-01 files should be reclassified here. -07 Original secondary closed, (former title Register of Irretrievable information) - a word processing document that covered one-time destructions of records that were destroyed

APPENDIX B
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Primary	Title	Type of Change	Comments
		<p>paper files, NOTES modified</p> <p>-04 secondary changed</p> <p>-05 added includes qualifier and NOTES</p> <p>-06 added includes qualifier and changed retention period</p> <p>-07 now PDC Committee records</p> <p>-08 added OPR and NOTE, minor title change</p> <p>-09 closed; no longer used</p> <p>-13 deleted; covered by 12900-20</p> <p>-14 changed title, added includes qualifier, FR statement and NOTE</p> <p>-15 Deleted</p> <p>-17 new secondary</p> <p>-19 changed title slightly, added qualifier, and NOTE, semi-active retention changed</p> <p>-30 and -35 deleted, and moved to -02</p> <p>-40 closed; no longer used</p>	<p>before approvals were obtained because the records were deemed to be a health hazard (pest infestations). The destruction was approved later. This happened only once.</p> <p>New -07 files were previously classified as 204-20</p> <p>-14 files currently labelled 12830-03 (3rd floor stacks)</p> <p>-15 (Executive summaries for ORS) –these are classified with the relevant schedule application file</p> <p>-17 previously classified in 12820-01</p> <p>-19 semi-active of 10years changed to nil</p>
12840 to 12850	Backlog	Deleted	Covered by new secondary 12800-02
12860 to 12895	Archival Holdings	Deleted	Covered by updated primary 12800. Reclassify relevant -01 files to 12830-04. See 12895-01 for records of transfers.
12900	External Appraisals and Certifications	<p>Primary title, Scope note</p> <p>Cross-references revised</p> <p>-02 new secondary</p> <p>-03 changed title slightly, and changed retention</p> <p>-04,-06, -07, -10, -12, new secondaries</p> <p>-20 changed title slightly, added includes and arrange qualifiers, and NOTE, retention changed</p>	<p>-02 covers Canadian Cultural Property Export Review Board (CCERB) polices and guidelines</p> <p>-03 active now 'SO', semi active 'nil'</p> <p>-06 CPERB notifications</p> <p>-07 National Archival Appraisal Board</p> <p>-10 Professional organizations and dealers</p> <p>-12 Tax appraisal forms register</p> <p>-20 retention changed to CY+10y to satisfy CCERB requirements and operational needs. Semi active retention now 'nil'.</p>
12920	Issues	Deleted	Covered by primary 11860
12950 to	Selection Backlog	Deleted	Not used. Covered by new secondary 12800-

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Primary	Title	Type of Change	Comments
12960			02. 12950 now covers Archival Holdings
12950 (new)	Archival holdings	-20 to -40 new secondaries covering primaries 12860 to 12895 -50 new secondary	-50 Library holdings
12970	Selection Criteria	Deleted	Not used. Covered by 11370-20.
13000	Arrangement and Description	Scope, record types Cross-references revised -03, -05, -07, -20 new secondaries	
13010	Administrative Histories	Combined with biographical sketches primary 13020 Primary title Scope note Cross-reference -20 combined with 13020-20; title changed -30 combined with 13020-30; title changed	
13020	Biographical Sketches	Deleted, and moved into primary 13010	
13050	Access Tools	Scope note Cross-references -03 changed title, added includes qualifier and NOTE -04 changed title, SO, and added NOTE -05 changed title and retention period and final disposition, qualifiers expanded -10 new secondary -20 changed title, added qualifiers, NOTES, and changed retention and final disposition for electronic finding aids -30 qualifiers exp. -35 new secondary for database -40 to -60 slight change to titles, expanded qualifiers and added NOTES -70 added secondary	-05 scope of series broadened to include a range of access tools, formerly just card catalogue. -10 covers shelf list cards (formerly 12520-05) retention and disposition changed -70 covers online indexes
13100	Issues	Deleted	Hardly used. Now covered by 11370 and 11860

APPENDIX B
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Primary	Title	Type of Change	Comments
13150	Name/Subject Authority Control	Primary title, scope note, record types Cross references -03 to -08 new secondaries -20 replaced by new secondary -30 deleted; not used -40 changed media qualifiers and changed retention for electronic records -50 changed SO	
13200 to 13260	Research Files	Deleted block and combined primaries under 13200 Changed primary title and scope note Added cross-reference covering deleted primary 13260 Created secondaries for the other primaries Also, -50 for legacy research files	-40 covers Film/video catalogues (formerly 13250-30)
13300 to 13490	Automated Systems and Media Technologies (section 10)	Deleted	Hardly used. 13640-20 has files opened under it and the records are scheduled as SR. These issues files be classified in more appropriate primaries under 11370-20 and/or 11860-30 or relevant ARCS secondaries.
13600	Application of Information Systems and Technology-General	Deleted	Section default no longer required
13620	Cost-Benefit Analysis and Methodologies	Deleted	Hardly used
13640	Issues	Deleted	See comments above (13300-13490)
13660	Equipment and Supplies - General	Deleted	Not used
13700	Equipment and Supplies - Procurement and Disposal	Deleted	
13770	Imaging Projects	Scope note -02 to 04 deleted, not used -20 and -30 changed SO and added NOTE -35 added for issue/reference files	-01 During implementation, there are 27-01 files in Yates central files, organized by ministry/office – should be reclassified to –20 35 records formerly classified in 13640 which has been deleted

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Primary	Title	Type of Change	Comments
13780	Ministry Automated Records Management System Projects	Deleted	Covered by ARCS 6450-20 or by 11860-30
13900	Media Preservation and Conservation - General	Primary title slightly, scope note -20 new secondary NOTEs, cross-references	-20 covers the Preservation Database
13905	New primary	Archival Media – General NOTE added to clarify classification	Required to keep 13910 to 14000 in a block. Can no longer use section default for that purpose
13910 to 13990	Cartographic and Architectural to Textual Records	Scope note Cross-references -02 covers primary 14270 and secondaries -20 -03 new secondary	
14000	Microfilm	Renumbered as primary 13950 Now covers new primary Records Preservation	New primary "Records Preservation" required to group primaries 14100 – 14260 into a block.
14100	New primary	Care and Handling	
14120	Condition and Treatment Reports	Primary title slight change Scope note Cross-references -20 slight title change, qualifiers and NOTE modified, final disposition changed -30 new secondary	-30 and –40 merged into –20, -30 now covers legacy conservation documentation.
14150	Emergency and Disaster Preparedness	Primary title slight change, scope note Cross-references -03 title change, qualifiers added, retention and disposition changed -04 changed title ,content , minor change to SO -05 new secondary -30 expanded qualifiers, changed retention to SO rather than CY +9y, modified NOTE	-03 formerly these plans were reclassified to secondary –20 when a new plan was drafted -04 formerly only contact lists, now series expanded, minor change to SO
14170	Issues	Replaced by new primary	Issues are classified under 14000-20, 11370 or 11860. New primary is Environmental Monitoring

APPENDIX B
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Primary	Title	Type of Change	Comments
14200	Material Testing and Analysis	Primary title slight change, scope note Cross-references -02 new secondary -20 slight title and SO change	
14240	New primary	Pest Control	
14260	Surveys and Priority Planning	Primary title slight change, scope note Cross-references -03 changed title slightly -04 added includes qualifier which covers -20 and -30, and FR statement -20 and -30 deleted; classified under -04	
14270	Technical Research Materials	Deleted	Covered by new secondary -02 under 13910 to 13990. 14270-20/REDOX files move to 14260-04.
14420	Imaging Services - General	Deleted	Not used
14430	Micrographics - General	Slight primary title change Scope note Cross-references	
14435	Micrographics - Filming Projects	Slight primary title change Scope note -03 deleted, not used -04 covers paper reports -05 Changed SO and final disposition for electronic records and added NOTE -20 Changed retention and final disposition, and added includes and arrange qualifiers -30 new series	-30 original secondary deleted, not used; but covered by -20. New -30 covers legacy microfilm registers and lists
14440	Micrographics - Processing and Inspection	Slight primary title change Scope note Cross-references -02 new secondary -04 changed title, and changed retention and	-10 covers quality control inspection reports which are classified here until the project is completed, and then re-classified to secondary 13770-20

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Primary	Title	Type of Change	Comments
		final disposition -05 deleted, not used (the logs were never created) -06 changed retention and final disposition and added NOTE -07 deleted, not used (records don't exist) -08 changed retention, added media qualifier -09 replaced with new secondary (there were never any records created for the silver recovery process) -10 new secondary -20 changed title, retention and final disposition -30 deleted, not used; covered by new secondary -02	
14460	Micrographic - Production Schedules and Documentation	Deleted	Only used for the processing production sheets which are now covered by new secondary 14440-09
14500	Photographic - General	Deleted	Not used
14520	Photographic - Processing	Slight primary title change Scope note -03 deleted, not used -04 title change -05 title change and retention change -20 changed retention period and final disposition, added qualifiers and NOTE -30 changed title, qualifier slightly, and SO statement -40 deleted, doesn't exist; and covered by -30	
14530 to 14540	Imaging Services - Electronic	Deleted	Not used. The records that document this function are the reproduction orders under primary 14600, and to a lesser extent secondary 14520-20
14560	Technical Reference Materials	Deleted	Not used. Covered by ARCS primary 358

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14600 to 14680	Media Duplication Services	Deleted block and combined primaries under primary 14600 and included primary 15390 (Information Copying) Changed primary title and scope note Reduced retention periods Cross-references -20 to -40 covers deleted primaries	
15100	Outreach Programs - general	Primary title and scope Cross references, NOTE -02, -20 and -25 new secondaries	-02 and -20 cover user guides -25 covers BC Archives Web site
15140	Archival Loan Administration	Scope note Types of records Cross-reference -03 added media qualifier and NOTE -20 and -30 deleted and merged into -40 -40 changed title, qualifiers, retention periods	
15150	New primary	Access Initiatives	
15160	Diffusion Programs	Deleted	There are no records classified here.
15180	Exhibits	Deleted	This primary is now part of new primary 15450, which covers outreach and volunteer activities
15300	Access Services – General	Deleted	Not required, sections 14 and 15 merged, section default is 15100
15320	Client Registration	Deleted	Now covered by 15480-08 and -09
15330 to 15350	Information Access	Combined primaries into 15350 Primary title Scope note Cross references -03, -05, -10, new secondaries -35 new secondary Explanatory NOTES added throughout	15340-03 is now 15350-02 (new title) 15340-20 is now 15350-35 (new title) 15340-30 did not exist; deleted 15350-20 did not exist; deleted; replaced by new secondary -20 15350-30 is still 15350-30 (title change, retention change) 15350-40 is still 15350-40 (title change, retention and disposition change)
15390	Information Copying	Moved and renumbered as 14600	

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Primary	Title	Type of Change	Comments
15400	Intellectual Property - General	Deleted – primary block no longer exists	Rolled into primary 15420
15410	Intellectual Property - British Columbia	Deleted	Not used. Covered by new secondary 15420-03
15420	Intellectual Property - Publication Permissions	Primary title Scope note Cross-references -02, -03, -05 new secondaries -20 changed -25 new -30 deleted -35 new	-02 covers complaints and inquiries -03 (Intellectual property precedent files) also covers IP concerns in other jurisdictions, which was previously covered by 15430. -05 covers licensed agent liaison -20 covers use permissions – BC Archives -25 covers use permissions- licensed agent -35 covers BC Archives intellectual property initiatives
15430	Intellectual Property - Other jurisdictions	Deleted	Not used. Covered by new secondary 15400-02
15450	New primary		Primary covers volunteer and outreach activities and exhibits (exhibits formerly primary 15180)
15480	Research Inquiries	Primary title, scope note Record types Cross-references -02 new secondary -03 replaced by new series -04 deleted; not used -05 reduced retention period and added NOTE -07 changed title slightly, added qualifiers and increased retention period -08 covers deleted secondary 15320-03; increased retention period and added NOTE -09 covered deleted secondary 15320-20; increased retention period and added NOTE -10 new secondary -20 includes -30 and -40, retention period lengthened, SR statement drafted -40 replaced by new secondary	-03 and -04 not used -40 covers routine technical inquiries

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Primary	Title	Type of Change	Comments
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INFORMATION SYSTEM OVERVIEW SECTION

TABLE OF CONTENTS

ISO TITLE

Archives and Records Information System	ARIS
British Columbia Archives Web site	BCAW
Corporate Records Management Web site	CRMW

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INFORMATION SYSTEM OVERVIEW

Name of Creating Agency

Ministry of Management Services
British Columbia Archives

System Title

Archives and Records Information System (ARIS)

Purpose

ARIS is the database used to manage government's semi-active records and archival holdings. It registers and tracks the off-site storage of semi-active and inactive (and upon request, active records) of ministries/agencies; carries out automated processes, such as notification of records disposition and destruction processing; enables data supplied by ministries/agencies to be used by BC Archives to apply records retention schedules, perform archival selection, and respond to FOI and reference requests; maintains a comprehensive organization chart of government over time (also known as the name authority) which, among other functions, tracks records custody and control; tracks the records scheduling process and maintains information about the context in which records were created, used, and acquired by BC Archives. ARIS also serves as an index to paper accession and schedule application files, and as a source of reports used for a variety of projects.

Information Content

ARIS contains information relating to the accessioning, appraisal, acquisition, storage, final disposition, selection and description of records. ARIS also documents the legal custody of records and access rights to the records, and contains a detailed history of government organizational changes since 1 April 1991, with ministry level changes documented from 1871.

Inputs, Processes, and Outputs

BC Archives enters data from documentation supplied by the ministry/agency at the time of records transfer. Each records transfer is linked to an 'accession' number that is used to track the records. BC Archives arranges for the records to be picked up and delivered to off-site storage, and manages the accession in ARIS throughout the time it remains in storage. Managing off-site records involves updating access authorizations and documenting any changes to the legal custodian or changes to the content of the accession.

While the records are active or semi-active, they remain in the legal custody and control of the ministry/agency designated as the 'current legal custodian' (usually the creator of the records). The legal custodian retains responsibility for the records, including authorizations for access, until records are transferred to the custody of the BC Archives or destroyed. The ARIS 'Name Authority' (among other functions) tracks the creators and legal custodians of these records.

The status of each retention and disposition schedule is tracked on ARIS. Information used to update the status is maintained in the schedule application file which documents the drafting, review, approval and amendment of all records retention and disposition authorities (ARS 008 form).

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

Schedule application files also cover the application of approved schedules to specific records. For each records accession transferred to storage, the ministry/agency sends a form requesting authority to apply an approved schedule (ARS 517a/b) or one requesting that a draft schedule be applied once approved (ARS 118). BC Archives applies the approved schedule, entering this information into the system, and producing a client authority to apply schedule form (ARS 130). A copy of this form is sent to the ministry/agency, and when the records are ready for disposition, a 60-day notice (ARS 196) is generated by ARIS and sent to the ministry/agency.

ARIS is used to generate a variety of reports, including accession reports, application reports, processing backlog reports, location reports, storage chargeback reports, disposition status reports, and name authority reports.

Technical Maintenance

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

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

Classification

Electronic System

11000-20 Archives and Records Information System (ARIS)

Electronic Records

Secondary No.	Secondary Title
12410-02	Accession files
12430-02	Disposition status reports
12830-03	Acquisition authority files
13150-03	ARIS name authority table
13150-40	Name authority reports

Inputs

Secondary No.	Secondary Title
ARCS 350-20/DDA	Legal issues
12400-20	Records Contract case files
12410-02	Accession files
12410-03	Access authorization amendments
12410-06	Ongoing accession number (OAN) assignment log
12830-03	Schedule application files
13150-50	Name authority worksheets (ARS 470)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Outputs

Secondary No.	Secondary Title
11860-04	Records officer listing
12400-04	Chargeback of records center services
12410-02	Accession files
12430-02	Disposition status reports
12490-05	Location reports (ARS 450)
12490-07	Storage location reports (ARS 456)
12800-02	Unprocessed records status reports
12830-02	ARIS schedule and application reports
12830-03	Schedule application files
13150-40	Name authority reports
14435-20	Filming projects

Other Related Records

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

System Scheduling and Disposition

See final disposition note under secondary 11000-20.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INFORMATION SYSTEM OVERVIEW FOR A WEB SITE

Web Site Title and URL

British Columbia Archives Web site: www.bcarchives.gov.bc.ca/index.htm

Name of Creating Agency

Ministry of Management Services
British Columbia Archives

Purpose

The purpose of the site is to provide internet access to information about BC Archives and its holdings. The intended audiences for the web site are the general public and government archival staff.

Information Content

The web site was established in 1995, and contains:

- general information about BC Archives (e.g., history, programs, annual reports, hours of operation, registration procedures, and copying and reproduction services and prices);
- access tools covering records in all media (e.g., textual, visual and cartographic records), including catalogue entries, file lists, fonds and series descriptions);
- bibliographic descriptions of items catalogued in the BC Archives library;
- reference room research and orientation guides;
- indexes to historical vital events in British Columbia (i.e., births, deaths, marriages);
- information about genealogical resources; and
- information about The Friends of the British Columbia Archives, which is an incorporated, non-profit organization concerned with the archival heritage of British Columbia and its people.

Web Site Features

Features include:

- web site history and milestones (<http://www.bcarchives.gov.bc.ca/whatsnew.htm>);
- the Amazing Time Machine, an exhibition that provides access to British Columbia historical documents, images, and other multimedia information in a format designed for school-age children;
- query screens that allow users to conduct searches of the historical vital events and visual records indexes; access tools covering all media; and the BC Archives Library;
- online enquiry forms and a copyright permission request form;
- links to related archival and government web sites e.g., the Archives Association of British Columbia, List of Genealogical Societies and Provincial/Territorial Archives maintained by the National Archives of Canada.

Classification and Scheduling

Records are maintained on the web site as long as appropriate. For retention and disposition schedules covering these records, see relevant primaries/secondaries, which are listed below.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

Web Site

Primary/Secondary No.	Title
15100-25	British Columbia Archives Web Site

Records on the web site

Primary/Secondary No.	Title
11370-03	Corporate policy
12950	Archival holdings
13050-20	Standardized finding aids
13050-04	Library access tools
13050-40 to -60	Legacy access tools
13050-70	Online descriptive indexes
15450-02	Friends of the BC Archives
15150-20	Access initiative case files

Other Related Records

- For transitory data processing records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in the *ARCS* manual.
- For administrative records relating to the web site, see *ARCS* section 6 and other relevant primaries.
- For *ARCS On-line* maintenance files, see secondary 12720-05

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

INFORMATION SYSTEM OVERVIEW FOR A WEB SITE

Web Site Title and URL

Corporate Records Management Web site

www.bcarchives.gov.bc.ca/infomgmt/infomgmt.htm

Name of Creating Agency

Ministry of Management Services
British Columbia Archives

Purpose

The purpose of the site is to provide internet access to government records management policy, procedures, guidelines, and standards and other records management resource material. The main intended audience is government records management staff.

Information Content

The web site was established in 2000, and contains: government records management policies, procedures, guidelines, and standards; an overview of records preservation and conservation issues; and information regarding committees such as the Ministry Records Officer Committee (MROC).

Web Site Features

Features include:

- *Administrative Records Classification System (ARCS) On-line*, which is the standard classification system and records retention and disposition schedule for administrative records of the BC Government;
- *Standard ORCS Kit*, which presents the content and format standards for the development of operational records classification systems (ORCS).
- links to related government web sites e.g., the provincial government's *General Management Operating Policy*.

Classification and Scheduling

Records are maintained on the web site as long as appropriate. For retention and disposition schedules covering these records, see relevant primaries/secondaries, which are listed below.

Web Site

Primary/Secondary No.	Title
11000-25	Corporate Records Management Web site

Records on the web site

11370-03	Corporate policy
12830-03/100001/ARCS	Schedule application files

Other Related Records

- For transitory data processing records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see special schedule 112910 in the *ARCS* manual.
- For administrative records relating to the web site, see *ARCS* section 6 and other relevant primaries.
- For *ARCS On-line* maintenance files, see secondary 12720-05

ARCHIVES AND RECORDS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

INDEX

This index provides an alphabetical guide to *ORCS* subject headings and relevant primary number(s). It should enable the user to locate the primary number(s) in which documents relating to a specific subject or function may be classified. It should also aid the user in retrieving, by subject, documents which have been classified and filed.

Employees responsible for records classification should use this index as a means of access to the contents of *ORCS*. Once they have located what appear to be relevant index entries for a given subject, they should refer to the primary or primaries listed in order to determine which is the correct classification and also to determine the correct secondary. Often, the primary scope notes will clarify whether or not a document should be classified in a given primary. Primary scope notes should be read carefully as they delineate a primary's subject and content.

This index contains an alphabetical listing of:

- a) all keywords which appear in primary titles;
- b) all keywords which appear in secondary titles;
- c) keywords which appear in primary scope notes;
- d) common synonyms for indexed keywords; and
- e) common abbreviations.

Cross-references:

"See" references indicate that the subject heading sought is indexed under an alternate entry (a more appropriate keyword, a full or official name, etc.).

"See also" references are used when additional information can be found in another entry.

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- Corporate Records Management

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