**ORCS REGISTER OF AMENDMENTS**

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

- **Formal amendments:** Schedule application number assigned to the amendment and used during the review and approval process conducted by the relevant ministry/agency, Records Management Operations (RMO), PDC, the Public Accounts Committee, and the Legislature; e.g., 123456.

- **Administrative amendments:** ADAM plus a registration number issued by Records Management Operations (RMO); e.g., Administrative AMendment number thirty-eight is ADAM 38.

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

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

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<th>Unique identifier (ADAM # or Schedule #)</th>
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<th>Section/Primary/Secondary</th>
<th>Changes</th>
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</table>
FACILITY DESIGN AND CONSTRUCTION
OPERATIONAL RECORDS
CLASSIFICATION SYSTEM

GOVERNMENT RECORDS SERVICE
Facility Design and Construction Operational Records Classification System

Ministry of Health
Regional Programs, Design and Construction Division

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

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

For further descriptive information about these records, please refer to the attached executive summary.
This appraisal documents the recommendation for active and semi-active retention periods.

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

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

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

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

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

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

Records Analyst 9/04/92

ARCHIVAL APPRAISAL:

This appraisal documents the recommendation for final disposition.

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

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

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

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

Sheila Norton 17 October 1996
Archivist

Manager, Appraisal & Acquisition Section 9/04/92

The undersigned endorse the appraisals and recommendations:

Chas Norton 9/15

Ministry Records Officer 9/04/92
EXECUTIVE SUMMARY

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

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

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

A = Active  CY = Calendar Year  DE = Destruction
SA = Semi-active  FY = Fiscal Year  SR = Selective Retention by BCIMS
FD = Final Disposition  NA = Not Applicable  FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility  w = week  m = month  y = year
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C:\WP\DCON:97/07/29 Schedule 125812 ORCS/FDC EXEC SUMMARY - 3
This Operational Records Classification System consists of one section covering the following topics:

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

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

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A     SA     FD

Section I

FACILITY DESIGN AND CONSTRUCTION

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

BCIMS will fully retain five-year capital plans fourteen years after the fiscal year of their creation  FY+4y 10y FR

BCIMS will fully retain multi-level care design guidelines five years after new or revised guidelines are issued.  SO 5y FR

BCIMS will fully retain facility master plans files after the information is superseded or obsolete.  SO nil FR

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

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

BCIMS will selectively retain facility functional programs after the information is superseded or obsolete.  SO nil SR

BCIMS will selectively retain facility construction project files ten years after the fulfillment of the contractual agreement and completion of the project.  SO+1y 9y SR

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C:\WP\DCON:97/07/29 Schedule 125812 ORCS/FDC EXEC SUMMARY - 5
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<td>FY+1y 5y</td>
<td>DE</td>
<td></td>
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<tr>
<td>FY+1y 5y</td>
<td>DE</td>
<td></td>
</tr>
</tbody>
</table>

General capital planning records will be retained for four years after the calendar year of their creation. They will then be destroyed.

Capital project summaries and project cost estimates will be retained until the project information is superseded. They will then be destroyed.

Financial forecasts will be retained for six years after the fiscal year of their creation. They will then be destroyed.

Health Facilities Association of B.C. project approvals and capital by-laws and certificates of approval will be retained for eleven years after the completion of the project. They will then be destroyed.

Letters patent will be retained until their amendment, recall, cancellation, rescindment or reissue. They will then be destroyed.

Regional hospital district budgets will be retained for six years after the fiscal year of their creation. They will then be destroyed.

General capital financing records will be retained for six years after the fiscal year of their creation. They will then be destroyed.

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<td>DE</td>
</tr>
<tr>
<td>FY+1y</td>
<td>25y</td>
<td>DE</td>
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</tbody>
</table>

Data on the Capital Finance System (CFS), the Expenditure Tracking System (ETS) and the Health Facilities Association System (HFAS) electronic databases will be retained until they are converted to another electronic database system.

Certificate of approval status reports and HFAS summary reports will be retained until the information is revised or updated. They will then be destroyed.

Daily outstanding balances and discrepancy reports will be retained for one month, then destroyed.

Debt servicing invoice will be retained for six years after the fiscal year of their creation. They will then be destroyed.

Greater Vancouver Regional Hospital District expenditure reports will be destroyed the year after the fiscal year in which they were created.

Interim interest billings will be retained for twenty-six years after the fiscal year of their creation. They will then be destroyed.

Schedule C and D contracts will be retained for seven years after the expiry of the certificate of approval. They will then be destroyed.

Closed RHD and the Health Facilities Association certificates will be retained for twenty-six years after the fiscal year in which the project is completed and the certificate of approval account is closed. They will then be destroyed.

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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SA = Semi-active
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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<tr>
<td>SO+1y 2y</td>
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Claim for major and Treasury Board minor cost-shared construction projects will be retained for twenty-one years after the completion of the project. They will then be destroyed.

Grant applications and claims for minor capital construction projects carried out at acute/extended care and intermediate care facilities will be retained for seven years after the completion of the project. They will then be destroyed.

Claims for major and Treasury Board minor non-cost-shared construction projects will be retained for seven years after the completion of the project. They will then be destroyed.

Consultant eligibility lists and consultant selection criteria will be retained until information is updated or is no longer current. They will then be destroyed.

Canadian Construction Documents Committee standards and provincial and national building codes will be retained until new or revised standards are issued. They will then be destroyed.

Design guideline development files will be retained for three years after new or revised guidelines are issued. They will then be destroyed.

Seismic assessments will be retained until new or additional studies are completed. They will then be destroyed.

Engineering guideline development files will be retained for three years after new or revised guidelines are issued. They will then be destroyed.

\[ A = \text{Active} \quad \text{CY} = \text{Calendar Year} \quad \text{DE} = \text{Destruction} \]
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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Initial facility design drawings are retained for one year after the design is revised or updated. They are then destroyed.

Facility working drawings on paper are retained for one year after the project is completed, the original plans have been microfilmed and the microfilm quality verified. They are then destroyed.

Facility working drawings created using computer assisted drafting (CAD) will be retained until the facility is closed. They are then destroyed.

Facility specifications will be retained for eight years after the fulfillment of the contractual agreement and completion of the project. They are then destroyed.

Project change orders are retained for seven years after the fulfillment of the contractual agreement and completion of the project. They are then destroyed.

Unsuccessful tender bids are retained for six years after the calendar year of their creation. They are then destroyed.

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C:\WP\DCON:97/07/29 Schedule 125812 ORCS/FDC EXEC SUMMARY - 10
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A  SA  FD

SECTION 1

FACILITY DESIGN AND CONSTRUCTION

PRIMARY NUMBERS

50000 - 50999

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

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50000 - FACILITY DESIGN AND CONSTRUCTION - 50999

PRIMARY NUMBERS AND PRIMARY SUBJECTS

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<td>- BUDGET ALLOCATIONS AND PRIORITIES</td>
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<td>- PROJECT APPROVALS</td>
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<td>50350</td>
<td>- MINOR CAPITAL PROJECTS</td>
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<td>50370</td>
<td>- NON-COST-SHARED PROJECTS</td>
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<th>50500</th>
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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50100  CAPITAL PLANNING - GENERAL

Records relating to types and levels of funding, funding initiatives, and examining alternatives for funding health facility development not shown elsewhere in this primary block. Includes correspondence, memoranda, reports and studies.

For facility master plans and functional programs, see primary 50630.
For five-year capital plans, see primary 50130.

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

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

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-00  Policy and procedures
- OPR
- non-OPR

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

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

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

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

A SA FD

50130 CAPITAL PLANNING - BUDGET ALLOCATIONS AND PRIORITIES

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

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

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

For regional hospital district budgets, see primary 50170.

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

-00 Policy and procedures
  - OPR
  - non-OPR

-01 General

-02 Capital project summaries

SO = when project information is superseded

(Continued on next page)

A = Active
SA = Semi-active
FD = Final Disposition
OPR = Office of Primary Responsibility
PIB = Personal Information Bank
BCIMS = B.C. Information Management Services

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
w = week
m = month
y = year
DE = Destruction
SR = Selective Retention by BCIMS
FR = Full Retention by BCIMS
SO = Superseded or Obsolete

PUR = Public Use Records

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Retention</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>50130</td>
<td>CAPITAL PLANNING - BUDGET ALLOCATIONS AND PRIORITIES (Continued)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-03</td>
<td>Project cost estimates (HLTH 1553)</td>
<td>SO nil DE</td>
<td>SO</td>
<td>when project information is superseded</td>
</tr>
<tr>
<td>-04</td>
<td>Financial forecasts</td>
<td>FY+1y 5y DE</td>
<td>7y</td>
<td>These records retain primary operational, fiscal, legal and audit values for a period of seven years.</td>
</tr>
<tr>
<td>-05</td>
<td>Five-year capital plans</td>
<td>FY+4y 10y FR</td>
<td>15y</td>
<td>The five year capital plan is a Treasury Board submission document. This retention ensures compliance with the Freedom of Information and Protection of Privacy Act (RSBC 1996, c.165, s.12).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>FR</td>
<td>BCIMS will fully retain five-year capital plans because of their significant historical and evidential value.</td>
</tr>
</tbody>
</table>

A = Active  CY = Calendar Year  DE = Destruction  
SA = Semi-active  FY = Fiscal Year  SR = Selective Retention by BCIMS 
FD = Final Disposition  NA = Not Applicable  FR = Full Retention by BCIMS 
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50150 CAPITAL PLANNING - PROJECT APPROVALS

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

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

CY+1y 2y DE

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

SO nil DE

-00 Policy and procedures - OPR SO 5y FR
- non-OPR SO nil DE

-01 General

-02 Health Facilities Association of B.C. project approvals SO+1y 10y DE

SO = upon completion of the project

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

SO = upon completion of the project

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

A = Active
SA = Semi-active
FD = Final Disposition
OPR = Office of Primary Responsibility
PIB = Personal Information Bank
BCIMS = B.C. Information Management Services

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
SR = Selective Retention by BCIMS
FR = Full Retention by BCIMS
w = week m = month y = year

DE = Destruction
NA = Not Applicable
SO = Superseded or Obsolete

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A  SA  FD

50170  CAPITAL PLANNING - REGIONAL HOSPITAL
        DISTRICT BUDGETS

Records relating to the preparation and submission of regional hospital district budgets according to the Hospital District Act (RSBC 1996, c. 202). Includes letters patent, correspondence, minutes, by-laws, tax schedules, notices of annual hospital requisitions and budgets.

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

\[ CY + 1 \text{y} \quad 2 \text{y} \quad \text{DE} \]

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

\[ \text{SO} \quad \text{nil} \quad \text{DE} \]

-00 Policy and procedures

- OPR

- non-OPR

-01 General

-20 Letters patent

(arrange by regional hospital district)

\[ \text{SO} \quad \text{nil} \quad \text{DE} \]

SO = upon amendment, recall, cancellation, rescindment or reissue of letters patent

-30 Regional hospital district budgets

(arrange by regional hospital district)

\[ \text{FY} + 1 \text{y} \quad 5 \text{y} \quad \text{DE} \]

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

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A    SA    FD

50200  CAPITAL FINANCING - GENERAL

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

For audits, see ARCS primary 975.
For capital project summaries, see primary 50130.
For construction expenditures, see primaries 50300 to 50370.
For financial management reports, statements and statistics, see ARCS primary 1180.
For ongoing accruals and reconciliations, see ARCS primary 910.

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

\[ \text{FY} + 1 y \quad 5y \quad \text{DE} \]

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

\[ \text{SO} \quad \text{nil} \quad \text{DE} \]

-00 Policy and procedures
  - OPR
  - non-OPR

-01 General

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50200 CAPITAL FINANCING - GENERAL (Continued)

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

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

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

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

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

A = Active CY = Calendar Year DE = Destruction
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C:\WP\DCON:97/07/29 Schedule 125812 ORCS/FDC SECT 1 - 12
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50230 CAPITAL FINANCING - CERTIFICATES OF APPROVAL

Records relating to the financing of major and Treasury Board minor construction projects under the certificate of approval borrowing program. This includes projects funded one-hundred percent by the Health Facilities Association of British Columbia as specified by the Hospital Insurance Act Regulations (B.C. Reg 25/61), and cost-shared projects according to the Hospital District Act (RSBC 1996, c. 202) and the Hospital District Finance Act (RSBC 1996, c. 203). Includes copies of certificates of approval, copies of capital by-laws raised by regional hospital districts (RHD), copies of contracts between RHD and banks (schedule C and D contracts), correspondence, memoranda, key data reports, certificate of approval status reports and electronic database files.

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

-00 Policy and procedures - OPR CY + 1y 2y DE

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

-00 Policy and procedures - non-OPR SO nil DE

-01 General SO 5y FR

-02 Bank correspondence SO nil DE

(Continued on next page)
50230   CAPITAL FINANCING - CERTIFICATES OF APPROVAL (Continued)

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

SO = upon conversion to another database

NA = data is transferred upon database conversion

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

-04 Certificate of approval status reports SO nil DE

SO = when information is revised or updated

-05 Daily outstanding balance reports 1m nil DE

-06 Daily discrepancy reports 1m nil DE

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

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

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

SO = upon conversion to another database

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50230 CAPITAL FINANCING - CERTIFICATES OF APPROVAL (Continued)

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

-09 Greater Vancouver RHD expenditure reports FY+1y nil DE

-10 Interim interest billing FY+1y 25y DE

27y = These records retain primary operational, fiscal, legal and audit values for a period of twenty-seven years.

-11 Schedule C contracts SO+1y 6y DE

SO = upon expiry of the certificate of approval

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

-12 Schedule D contracts SO+1y 6y DE

SO = upon expiry of the certificate of approval

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

(Continued on next page)

A = Active CY = Calendar Year DE = Destruction
SA = Semi-active FY = Fiscal Year SR = Selective Retention by BCIMS
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OPR = Office of Primary Responsibility w = week m = month y = year
PIB = Personal Information Bank VR = Vital Records PUR = Public Use Records
BCIMS = B.C. Information Management Services SO = Superseded or Obsolete
OPERATIONAL RECORDS CLASSIFICATION SYSTEM
This records schedule is approved in accordance with the Document Disposal Act (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by the British Columbia Information Management Services. For assistance in implementing ORCS, contact your Records Officer.

<table>
<thead>
<tr>
<th>50230</th>
<th>CAPITAL FINANCING - CERTIFICATES OF APPROVAL (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>-20</td>
<td>RHD certificates</td>
</tr>
<tr>
<td></td>
<td>(arrange by RHD, then by certificate of approval number)</td>
</tr>
<tr>
<td></td>
<td>SO = upon completion of the project and closure of the certificate of approval account</td>
</tr>
<tr>
<td></td>
<td>NA = Reclassify to secondary -30 when account is closed.</td>
</tr>
<tr>
<td>-30</td>
<td>Closed RHD certificates</td>
</tr>
<tr>
<td></td>
<td>FY + 1y 25y DE</td>
</tr>
<tr>
<td></td>
<td>27y = Certificates of approval retain their operational and audit value until any debentures have matured. Debentures are issued for periods of up to 20 years.</td>
</tr>
<tr>
<td></td>
<td>DE = Certificates of approval have no residual archival value.</td>
</tr>
<tr>
<td>-40</td>
<td>Health Facilities Association certificates</td>
</tr>
<tr>
<td></td>
<td>(arrange by program type, then by certificate of approval number)</td>
</tr>
<tr>
<td></td>
<td>SO = upon completion of the project and closure of the certificate of approval account</td>
</tr>
</tbody>
</table>

(Continued on next page)

A = Active  CY = Calendar Year  DE = Destruction  
SA = Semi-active  FY = Fiscal Year  SR = Selective Retention by BCIMS  
FD = Final Disposition  NA = Not Applicable  FR = Full Retention by BCIMS  
OPR = Office of Primary Responsibility  w = week  m = month  y = year  
PIB = Personal Information Bank  VR = Vital Records  PUR = Public Use Records  
BCIMS = B.C. Information Management Services  SO = Superseded or Obsolete  
C:\WP\DCON:97/07/29  Schedule 125812  ORCS/FDC  SECT 1 - 16
OPERATIONAL RECORDS CLASSIFICATION SYSTEM
This records schedule is approved in accordance with the Document Disposal Act (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by the British Columbia Information Management Services. For assistance in implementing ORCS, contact your Records Officer.

A  SA  FD

50230  CAPITAL FINANCING - CERTIFICATES OF APPROVAL (Continued)

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

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

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

DE = Certificates of approval have no residual archival value.

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A    SA    FD

50250  CAPITAL FINANCING - DEBENTURES

Records relating to the issue and repayment of debentures to finance the capital costs of construction projects carried out at health facilities as specified by the Hospital Act (RSBC 1996, c. 200), and the Hospital District Finance Act (RSBC 1996, c. 203). Includes correspondence, memoranda, balances, auto-debit authorizations, distribution schedules, repayment schedules, sales reports and copies of certified debentures.

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

Cy + 1y 2y DE

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

SO  nil  DE

-00  Policy and procedures - OPR
     - non-OPR

-01  General

-02  Auto-debit invoices

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

-03  Auto-debit correspondence

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

50250 CAPITAL FINANCING - DEBENTURES (Continued)

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

-04 Debenture repayment schedules

SO = when information is revised or updated

-20 Debenture files

(arrange by debenture series number)

SO = upon maturity of the debenture

-30 Debenture certification and transfer of assets

(arrange by debenture series number)

SO = upon maturity of the debenture

A SA FD

SO nil DE

SO +1y 6y DE

SO +1y 6y DE

A = Active CY = Calendar Year DE = Destruction
SA = Semi-active FY = Fiscal Year SR = Selective Retention by BCIMS
FD = Final Disposition NA = Not Applicable FR = Full Retention by BCIMS
OPR = Office of Primary Responsibility
w = week m = month y = year
PIB = Personal Information Bank VR = Vital Records PUR = Public Use Records
BCIMS = B.C. Information Management Services SO = Superseded or Obsolete
C:\WP\DCON:97/07129 Schedule 125812 ORCS/FDC SECT 1 - 19
This records schedule is approved in accordance with the *Document Disposal Act* (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by the British Columbia Information Management Services. For assistance in implementing ORCS, contact your Records Officer.

50270  CAPITAL FINANCING - FINANCIAL MANAGEMENT

Records relating to tracking certificate of approval accounts, debentures, debt servicing, scheduled and non-scheduled payments to finance construction projects carried out at health facilities according to the *Hospital Act* (RSBC 1996, c. 200), and the *Hospital District Finance Act* (RSBC 1979, c. 203). This includes both projects which are cost-shared with the regional hospital districts and those which are funded through the Health Facilities Association of British Columbia according to the *Hospital Insurance Act Regulations* (B.C. Reg. 25/61). Includes correspondence with banks and hospital districts, memoranda, repayment schedules, and copies of voided debentures.

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

-00  Policy and procedures  - OPR
     - non-OPR
-01  General

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

-20  Regional hospital district financial case files
     (arrange alphabetically by RHD)

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

50270 CAPITAL FINANCING - FINANCIAL MANAGEMENT
(Continued)

SO = upon maturity of debentures

-30 Health Facilities Association financial case files (arrange by program type)

SO = upon maturity of debentures

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

C:\WP\DCON:97/07/29 Schedule 125812 ORCS/FDC SECT 1 - 21
This records schedule is approved in accordance with the Document Disposal Act (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by the British Columbia Information Management Services. For assistance in implementing ORCS, contact your Records Officer.

50290 CAPITAL FINANCING - HEALTH FACILITIES ASSOCIATION PROJECTS

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

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

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

FY+1 y 5y DE

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

SO __ nil __ DE

-00 Policy and procedures - OPR

SO __ 5y FR

-01 General - non-OPR

SO __ nil __ DE

-02 Health Facilities Association System (HFAS) (electronic database)

SO __ nil __ DE

SO = upon conversion to another database

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A  SA  FD

50290  CAPITAL FINANCING - HEALTH FACILITIES
ASSOCIATION PROJECTS (Continued)

-03  HFAS summary reports  SO  nil  DE

SO = when information is superseded or obsolete

-04  Banking agreements  SO+1y  6y  DE

SO = upon expiry of the agreement and conclusion of any audit requirements

-05  Banking information (includes facility key data reports)  SO+1y  6y  DE

SO = when certificate of approval expires

-06  EFT confirmations
-07  Current year expenditure report
-08  Remaining authorized report

A = Active  CY = Calendar Year  DE = Destruction
SA = Semi-active  FY = Fiscal Year  SR = Selective Retention by BCIMS
FD = Final Disposition  NA = Not Applicable  FR = Full Retention by BCIMS
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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50300 CONSTRUCTION EXPENDITURES - GENERAL

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

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

\[\text{CY} + 1\text{y} \quad 2\text{y} \quad \text{DE}\]

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

\[\text{SO} \quad \text{nil} \quad \text{DE}\]

-00 Policy and procedures - OPR

\[\text{SO} \quad 5\text{y} \quad \text{FR}\]

- non-OPR

\[\text{SO} \quad \text{nil} \quad \text{DE}\]

-01 General

\[\text{CY} = \text{Calendar Year} \quad \text{DE} = \text{Destruction}\]

\[\text{SA} = \text{Semi-active} \quad \text{FY} = \text{Fiscal Year} \quad \text{SR} = \text{Selective Retention by BCIMS}\]

\[\text{FD} = \text{Final Disposition} \quad \text{NA} = \text{Not Applicable} \quad \text{FR} = \text{Full Retention by BCIMS}\]

\[\text{OPR} = \text{Office of Primary Responsibility} \quad \text{w} = \text{week} \quad \text{m} = \text{month} \quad \text{y} = \text{year}\]

\[\text{PIB} = \text{Personal Information Bank} \quad \text{VR} = \text{Vital Records} \quad \text{PUR} = \text{Public Use Records}\]

\[\text{BCIMS} = \text{B.C. Information Management Services} \quad \text{SO} = \text{Superseded or Obsolete}\]
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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50330  CONSTRUCTION EXPENDITURES - COST-SHARED PROJECTS

Records relating to claims for funds for major and Treasury Board minor construction projects which are cost-shared with the regional hospital districts according to the Hospital District Act (RSBC 1996, c. 202) and the Hospital District Finance Act (RSBC 1996, c. 203). Includes copies of project expenditure summaries (HLTH 1555) and copies of supporting invoices submitted to the hospital by the supplier.

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

 unless otherwise specified below, all other ministry offices will retain these records for:

-00 Policy and procedures
  - OPR CY+1y 2y DE
  - non-OPR

-01 General

-20 Claims for Treasury Board minor projects
  (arrange by location, then by project number)

SO = upon completion of the project

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

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50330 CONSTRUCTION EXPENDITURES - COST-SHARED PROJECTS (Continued)

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

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

SO = upon completion of the project

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

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

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

A  SA  FD

50350  CONSTRUCTION EXPENDITURES - MINOR CAPITAL PROJECTS

Records relating to applying and claiming for funding provided by the ministry for minor capital construction projects carried out at acute/extended care and intermediate care facilities according to the Hospital Act (RSBC 1996, c. 200), the Hospital District Finance Act (RSBC 1996, c. 203) the Hospital Insurance Act Regulations (B.C. Reg. 25/61), and the Financial Administration Act (RSBC 1996, c. 138). Includes copies of applications for grants (HLTH 1554), claims for grants (HLTH 1556), and supporting invoices, and correspondence.

For expenditure authorizations, see ARCS primary 1110.

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Ministry OPR Retention</th>
<th>Other Ministry Offices Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY+1y</td>
<td>Policy and procedures</td>
<td>OPR</td>
<td>nil</td>
</tr>
<tr>
<td>2y</td>
<td>General</td>
<td>non-OPR</td>
<td>nil</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Ministry OPR Retention</th>
<th>Other Ministry Offices Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>SO</td>
<td>Policy and procedures</td>
<td>OPR</td>
<td>nil</td>
</tr>
<tr>
<td>nil</td>
<td>General</td>
<td>non-OPR</td>
<td>nil</td>
</tr>
<tr>
<td>5y</td>
<td>Policy and procedures</td>
<td>OPR</td>
<td>nil</td>
</tr>
<tr>
<td>5y</td>
<td>General</td>
<td>non-OPR</td>
<td>nil</td>
</tr>
</tbody>
</table>

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

50350  CONSTRUCTION EXPENDITURES - MINOR CAPITAL PROJECTS (Continued)

-20 Minor grant applications and claims
(arrange by facility type, then alphabetically by location)

SO = upon completion of the project

NOTE: The Design and Construction Division will store Minor grant applications and claims under ongoing accession number 91-0348.

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

A = Active  CY = Calendar Year  DE = Destruction
SA = Semi-active  FY = Fiscal Year  SR = Selective Retention by BCIMS
FD = Final Disposition  NA = Not Applicable  FR = Full Retention by BCIMS
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BCIMS = B.C. Information Management Services  SO = Superseded or Obsolete

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

50370 CONSTRUCTION EXPENDITURES - NON-COST SHARED PROJECTS

Records relating to the payment of construction expenditures for major and Treasury Board minor projects which are funded one hundred percent by the Health Facilities Association of British Columbia according to the Hospital Insurance Act Regulations (B.C. Reg. 25/61). Includes project expenditure summaries (HLTH 1555) and supporting invoices, applications for funding (HLTH 1615), correspondence and memoranda.

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

-00 Policy and procedures - OPR
  - non-OPR
-01 General

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

-20 Claims for major projects

SO = upon completion of the project

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

A  SA  FD

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

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

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

SO = upon completion of the project

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

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

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

50400 DESIGN CONSULTANTS

Records relating to the public tendering process for design and construction projects, professional consultants, client/consultant agreements, inquiries and complaints, and consultant selection criteria. Includes correspondence and memoranda, sample contracts, and eligibility lists.

For bids on tendered projects, see primary 50670.

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

<table>
<thead>
<tr>
<th>Record Type</th>
<th>OPR Retention</th>
<th>Non-OPR Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy and procedures</td>
<td>CY + 1y 2y DE</td>
<td>nil DE</td>
</tr>
<tr>
<td>Consultant eligibility lists</td>
<td>SO nil DE</td>
<td>nil DE</td>
</tr>
<tr>
<td>Consultant selection criteria</td>
<td>SO nil DE</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Record Type</th>
<th>OPR Retention</th>
<th>Non-OPR Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy and procedures</td>
<td>SO 5y FR</td>
<td>nil DE</td>
</tr>
<tr>
<td>Consultant eligibility lists</td>
<td>SO nil DE</td>
<td></td>
</tr>
<tr>
<td>Consultant selection criteria</td>
<td>SO nil DE</td>
<td></td>
</tr>
</tbody>
</table>

SO = when information is updated or is no longer current

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A  SA  FD

50400  DESIGN CONSULTANTS (Continued)

-04  Canadian Construction Documents Committee standards  SO  nil  DE

SO = when new or revised standards are issued

-05  Architects correspondence
-06  Engineers correspondence
-07  Quantity surveyors correspondence

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

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

A SA FD

50450 DESIGN STANDARDS AND GUIDELINES

Records relating to the provision of technical and policy advice regarding aspects of architectural design in health care facility planning, construction and operation. Includes seismic assessments, building codes, design criteria for various kinds of treatment programs and/or types of facilities, correspondence, memoranda, studies and reports.

For design of specific projects, see primary 50650.
For engineering standards and guidelines, see primary 50500.
For facility planning, see 50630.

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

| CY + 1y | 2y | DE |

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

| SO | nil | DE |

| CY + 1y | 2y | DE |

-00 Policy and procedures - OPR
-01 General
-02 B.C. Building Code
-03 National Building Code

SO = when new or revised code is issued

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

| CY + 1y | 2y | DE |

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

| SO | nil | DE |

| CY + 1y | 2y | DE |

SO = when new or revised code is issued

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A  SA  FD

<table>
<thead>
<tr>
<th>50450</th>
<th>DESIGN STANDARDS AND GUIDELINES (Continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SO = when new or revised code is issued</td>
</tr>
<tr>
<td>-04</td>
<td>Multi-level care design guidelines</td>
</tr>
<tr>
<td></td>
<td>SO = when new or revised guidelines are issued</td>
</tr>
<tr>
<td></td>
<td>5y = This retention period ensures that guidelines are maintained for consultation and review.</td>
</tr>
<tr>
<td></td>
<td>FR = BCIMS will retain one copy of each edition of <em>Multi-level care design guidelines</em> for evidential value. Draft and duplicate materials may be purged and discarded.</td>
</tr>
<tr>
<td></td>
<td>-20 Design guideline development files</td>
</tr>
<tr>
<td></td>
<td>(arrange alphabetically by subject)</td>
</tr>
<tr>
<td></td>
<td>SO = when new or revised guidelines are issued</td>
</tr>
<tr>
<td></td>
<td>3y = This retention period ensures that records are maintained for consultation and review.</td>
</tr>
<tr>
<td></td>
<td>-30 Seismic assessments</td>
</tr>
<tr>
<td></td>
<td>(arrange by location)</td>
</tr>
<tr>
<td></td>
<td>SO = when new or additional studies are completed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA</td>
<td>Semi-active</td>
</tr>
<tr>
<td>FD</td>
<td>Final Disposition</td>
</tr>
<tr>
<td>OPR</td>
<td>Office of Primary Responsibility</td>
</tr>
<tr>
<td>PIB</td>
<td>Personal Information Bank</td>
</tr>
<tr>
<td>BCIMS</td>
<td>B.C. Information Management Services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CY</th>
<th>Calendar Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>DE</td>
<td>Destruction</td>
</tr>
<tr>
<td>SR</td>
<td>Selective Retention by BCIMS</td>
</tr>
<tr>
<td>FR</td>
<td>Full Retention by BCIMS</td>
</tr>
<tr>
<td>NA</td>
<td>Not Applicable</td>
</tr>
<tr>
<td>PUR</td>
<td>Public Use Records</td>
</tr>
<tr>
<td>SO</td>
<td>Superseded or Obsolete</td>
</tr>
</tbody>
</table>

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A       SA       FD

50500   ENGINEERING STANDARDS AND GUIDELINES

Records relating to the provision of technical and policy advice to health facilities staff, design consultants, and government staff regarding aspects of engineering in health care facility planning, design, construction and operation. Includes correspondence, memoranda, agendas, minutes, reports, and studies.

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

CY + 1 y   2 y   DE

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

SO       nil       DE

-00    Policy and procedures
       - OPR
       - non-OPR

SO       5 y       FR

-01    General

SO       nil       DE

-20    Engineering guidelines development files

SO + 1 y   2 y   DE

SO = when new or revised guidelines are issued

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

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

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### 50600 PROJECT REVIEW - GENERAL

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

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

```
CY+1y 2y DE
```

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

```
SO  nil DE
```

- **-00 Policy and procedures** - OPR
  - **-00 Policy and procedures** - non-OPR

- **-01 General**

---

<table>
<thead>
<tr>
<th>A</th>
<th>CY</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>CY</td>
<td>DE</td>
</tr>
<tr>
<td>SA</td>
<td>SA</td>
<td>FD</td>
</tr>
<tr>
<td>FD</td>
<td>FD</td>
<td>FD</td>
</tr>
<tr>
<td>OPR</td>
<td>OPR</td>
<td>OPR</td>
</tr>
<tr>
<td>PIB</td>
<td>PIB</td>
<td>PIB</td>
</tr>
<tr>
<td>BCIMS</td>
<td>BCIMS</td>
<td>BCIMS</td>
</tr>
</tbody>
</table>

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

50630  PROJECT REVIEW - PLANS AND PROGRAMS

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

For capital planning, see primaries 50100 to 50700.

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

\[ \text{CY +1y 2y DE} \]

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

\[ \text{SO nil DE} \]

\[-00\]  Policy and procedures  - OPR  SO 5y FR

\[-00\]  Policy and procedures  - non-OPR  SO nil DE

\[-01\]  General

\[-20\]  Facility functional programs  (arrange alphabetically by location)

\[ \text{SO nil SR} \]

\[ \text{SO = when the information is superseded or obsolete} \]

(Continued on next page)

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

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

A SA FD

50630 PROJECT REVIEW - PLANS AND PROGRAMS (Continued)

SR = BCIMS will selectively retain facility functional programs for their informational and historical value. Selection will include facility functional programs from one large hospital and one small hospital.

-30 Facility master plans
(arrange alphabetically by location)

SO = when the plan is superseded, or when the information becomes obsolete

FR = BCIMS will fully retain master plans for their informational and historical value.

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

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A SA FD

50650 PROJECT REVIEW - DESIGN PROJECTS

Records relating to the review and direction of design for health facilities as specified under the Hospital Act (RSBC 1996, c. 200) and the Building Safety Standards Act (RSBC 1996, c. 42). Includes architectural drawings (paper, computer assisted drafting and microfilm), specifications, change orders, correspondence and memoranda.

For facility construction projects, see primary 50670.
For facility master plans and functional programs, see primary 50630.
For floor plans of ministry buildings, see ARCS primary 510.

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

<table>
<thead>
<tr>
<th>-00</th>
<th>Policy and procedures</th>
<th>- OPR</th>
<th>CY + 1y 2y DE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- non-OPR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-01</td>
<td>General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-20</td>
<td>Initial facility design drawings</td>
<td></td>
<td>SO nil DE</td>
</tr>
</tbody>
</table>

(Continued on next page)

A = Active
SA = Semi-active
FD = Final Disposition
OPR = Office of Primary Responsibility
PIB = Personal Information Bank
BCIMS = B.C. Information Management Services

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
DE = Destruction
SR = Selective Retention by BCIMS
FR = Full Retention by BCIMS
w = week m = month y = year
SO = Superseded or Obsolete

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

50650 PROJECT REVIEW - DESIGN PROJECTS (Continued)

SO = when design is revised or updated

VR -30 Facility working drawings
(arrange alphabetically by location)
(paper)

SO = when projects are complete, the original plans are microfilmed and, once microfilm quality has been verified, the originals are destroyed

(microfilm)

SO = when facility is closed

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

(computer-assisted drafting)

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

(Continued on next page)

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

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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A = Active
SA = Semi-active
FD = Final Disposition
OPR = Office of Primary Responsibility
PIB = Personal Information Bank
BCIMS = B.C. Information Management Services

CY = Calendar Year
FY = Fiscal Year
NA = Not Applicable
VR = Vital Records
PUR = Public Use Records
SO = Superseded or Obsolete

DE = Destruction
SR = Selective Retention by BCIMS
FR = Full Retention by BCIMS
w = week
m = month
y = year

50650  PROJECT REVIEW - DESIGN PROJECTS (Continued)

-40  Facility specifications (arrange alphabetically by location)  SO+1y  7y  DE

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

7y = This will ensure records are retained until the expiration of the right to initiate a legal action specified under the Limitation Act (RSBC 1996, c. 266). The additional year is allowed for the serving of notice on all parties.

-50  Project change orders (arrange alphabetically by location)  SO+1y  6y  DE

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

NOTE: The Design and Construction Division will store project change orders under ongoing accession number 91-0346.
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A SA FD

50700 PROJECT REVIEW - CONSTRUCTION PROJECTS

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

For architectural drawings, see primary 50650.
For change orders, see primary 50650.
For construction of ministry buildings, see ARCS primary 545.
For master plans and functional programs, see primary 50630.
For project specifications, see primary 50650.
For summaries of completed projects, see primary 50690.

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

\[ \text{CY} + 1 \text{y} \ 2 \text{y} \ \text{DE} \]

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

\[ \text{SO} \ \text{nil} \ \text{DE} \]

-00 Policy and procedures - OPR SO 5y FR
- non-OPR SO nil DE

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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50700 PROJECT REVIEW - CONSTRUCTION PROJECTS
(Continued)

-01 General

-20 Facility construction project case files
   (arrange by location, then project number)

NOTE: Offices should classify documentation under this secondary unless they have sufficient volume to warrant classifying it in the secondaries listed below.

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

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

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

(Continued on next page)
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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50700  PROJECT REVIEW - CONSTRUCTION PROJECTS
(Continued)

10y = This will ensure that records are retained for an appropriate period to allow for any investigation or review.

SR = BCIMS will selectively retain project files for their unique evidential, historical and informational value. Selection will include projects completed at the province's largest hospitals complemented by a selection on a rotational basis, ensuring that, over time, as wide a range as possible of geographical areas are represented.

-30 Unsuccessful tender bids CY 6y DE
(arrange alphabetically by project location)

7y = This will ensure records are retained until the expiration of the right to initiate a legal action specified under the Limitation Act (RSBC 1996, c. 266). The additional year is allowed for the serving of notice on all parties.

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

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

50800 PROJECT REVIEW - FACILITY PROFILES

Records relating to completed design, construction and renovation projects at a given facility. Includes written descriptions of the facility, statistics, photographs, surveys, space allocations, brief project summaries, and energy consumption data.

For functional programs and master plans, see primary 50630.

Unless otherwise specified below, the ministry OPR (Design and Construction Division) will retain these records for: CY + 1y 2y DE

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

-00 Policy and procedures - OPR SO 5y FR
- non-OPR SO nil DE
-01 General

-20 Hospital facility profiles (arrange alphabetically by location) SO nil FR

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

-30 Long-term care facility profiles (arrange alphabetically by location) SO nil FR

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

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

SO = upon closure of the facility
FR = BCIMS will fully retain facility profiles for their informational value.
INFORMATION SYSTEM OVERVIEW

1. MINISTRY, CROWN CORPORATION, OR AGENCY:

   Ministry of Health and Ministry Responsible for Seniors

2. DIVISION, BRANCH, SECTION, OR OFFICE:

   Design and Construction Division

3. SYSTEM TITLE:

   Capital Finance System (CFS)

4. APPLICATION TITLE:

   Capital Finance System (CFS)

5. PURPOSE:

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

6. INFORMATION CONTENT:

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

7. RETENTION AND DISPOSITION SUMMARY

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

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

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

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

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

8. INPUTS/PROCESSES/OUTPUTS

INPUTS

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

PROCESSES

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

OUTPUTS

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

50230-05 Capital financing - Certificates of Approval - Daily Outstanding Balance Reports
50230-06 Capital Financing - Certificates of Approval - Daily Discrepancy Reports
50230-07 Capital financing - Certificates of approval - Debt servicing invoices
50230-09 Capital Financing - Certificates of Approval - Interim Interest Billings
50230-20 Capital Financing - Certificates of Approval - RHD Certificates
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

A    SA    FD

9. SOFTWARE ENVIRONMENT

CFS was written in Nantucket’s CLIPPER.

10. HARDWARE ENVIRONMENT

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

11. SYSTEM MILESTONES

CFS was first designed and implemented in 1987-88.

12. USER CONTACT

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

13. TECHNICAL CONTACT:

Randy Slemko, Programmer/Analyst, 952-0897.

14. DOCUMENTATION/MANUALS CROSS REFERENCES:

Capital Payment Clerk Procedure Manual [no date]
Programmer specifications

15. OPERATIONAL RECORDS CLASSIFICATION:

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

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

16. OTHER RELATED RECORDS:

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

50230  Capital Financing - Certificates of Approval
INFORMATION SYSTEM OVERVIEW

1. MINISTRY, CROWN CORPORATION, OR AGENCY:

   Ministry of Health and Ministry Responsible for Seniors

2. DIVISION, BRANCH, SECTION, OR OFFICE:

   Design and Construction Division

3. SYSTEM TITLE:

   Expenditure Tracking System (ETS)

4. APPLICATION TITLE:

   Expenditure Tracking System (ETS)

5. PURPOSE:

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

6. INFORMATION CONTENT:

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

7. RETENTION AND DISPOSITION SUMMARY

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

   ETS user manuals and programmer specifications are retained until the database is
   superseded or obsolete, and then destroyed.
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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

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

8. INPUTS/PROCESSES/OUTPUTS

INPUTS

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

- 50230-06 Capital Financing - Certificates of Approval - Daily Discrepancy Reports
- 50370-20 Construction Expenditures - Non-cost Shared Projects - Claims for Major Projects
- 50370-30 Construction Expenditures - Non-cost Shared Projects - Claims for Treasury Board Minor Projects

PROCESSES

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

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

OUTPUTS

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

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

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

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

9. SOFTWARE ENVIRONMENT

ETS was written in Nantucket's CLIPPER.

10. HARDWARE ENVIRONMENT

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

11. SYSTEM MILESTONES

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

12. USER CONTACT

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

13. TECHNICAL CONTACT:

Randy Slemko, Programmer/Analyst, 952-0897.

14. DOCUMENTATION/MANUALS CROSS REFERENCES:

Capital Payment Clerk Procedure Manual [no date]
Programmer specifications

15. OPERATIONAL RECORDS CLASSIFICATION:

Facility Design and Construction ORCS, section 1, primary 50230:
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

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

16. OTHER RELATED RECORDS:

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

50230 Capital Financing - Certificates of Approval
OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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

INFORMATION SYSTEM OVERVIEW

1. MINISTRY, CROWN CORPORATION, OR AGENCY:

   Ministry of Health and Ministry Responsible for Seniors

2. DIVISION, BRANCH, SECTION, OR OFFICE:

   Design and Construction Division

3. SYSTEM TITLE:

   Health Facilities Association System (HFAS)

4. APPLICATION TITLE:

   Health Facilities Association System

5. PURPOSE:

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

6. INFORMATION CONTENT:

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

7. RETENTION AND DISPOSITION SUMMARY

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

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

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

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

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

8. INPUTS/PROCESSES/OUTPUTS

INPUTS

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

PROCESSES

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

OUTPUTS

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

50230-40 Capital Financing - Certificates of Approval - Health Facilities Association Certificates
50290-05 Capital Financing - Health Facilities Association Projects - Banking Information

9. SOFTWARE ENVIRONMENT

The HFAS was written in Nantucket's CLIPPER.

10. HARDWARE ENVIRONMENT

HFAS runs on a NEC PowerMate 450 es personal computer located at the Design and Construction Division in Victoria.
This records schedule is approved in accordance with the Document Disposal Act (RSBC 1996, c. 99). It constitutes authority for retention and disposition of the records described herein provided ORCS has been implemented according to standards approved by the British Columbia Information Management Services. For assistance in implementing ORCS, contact your Records Officer.

11. SYSTEM MILESTONES

The HFAS was designed and implemented in 1987-1988.

12. USER CONTACT

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

13. TECHNICAL CONTACT:

Randy Slemko, Programmer/Analyst, 952-0897.

14. DOCUMENTATION/MANUALS CROSS REFERENCES:

Capital Payment Clerk Procedure Manual [no date]
Programmer specifications

15. OPERATIONAL RECORDS CLASSIFICATION:

Facility Design and Construction ORCS, section 1, primary 50290

50290-02 Health Facilities Association System

16. OTHER RELATED RECORDS:

Facility Design and Construction ORCS, section 1:

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

Operational Records Classification System (ORCS)

INDEX

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

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

This index contains an alphabetical listing of:

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

Cross-references

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

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