POSTAL SERVICE AND DELIVERY OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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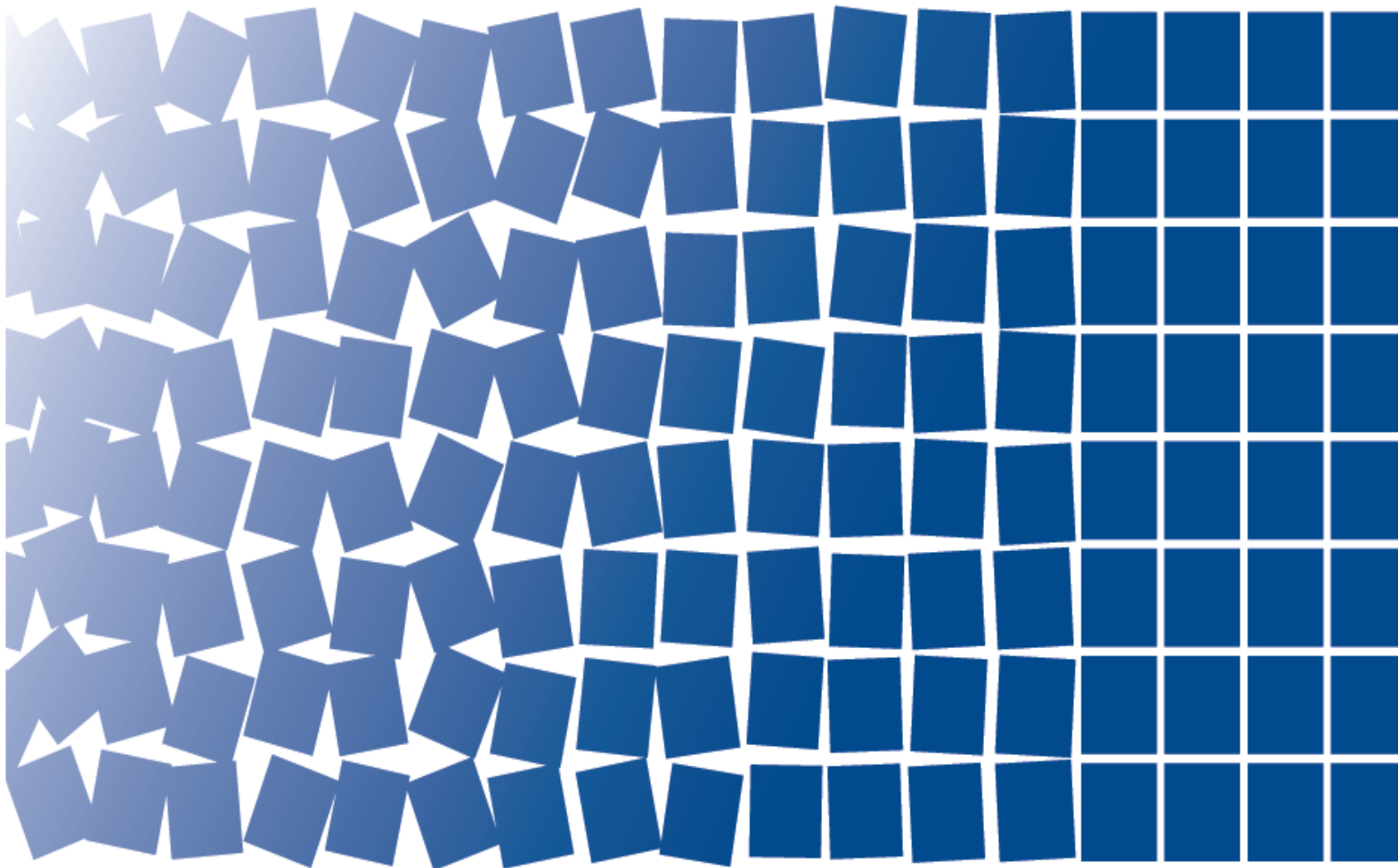
INFORMATION ACCESS OPERATIONS

POSTAL AND SERVICE DELIVERY

OPERATIONAL

RECORDS

CLASSIFICATION

SYSTEM

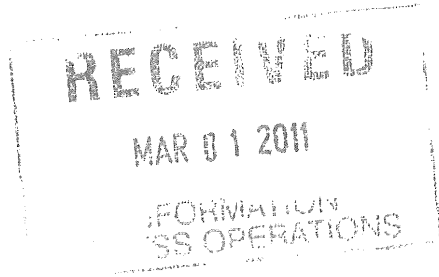**Province of British Columbia**

Information Access Operations

Postal and service delivery operational records classification system

Schedule No. 1 8 1 0 5 6

RECORDS RETENTION AND DISPOSITION AUTHORITY

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

Title Postal and Service Delivery Records Classification System

Ministry of Citizens' Services
Shared Services BC
Logistics and Business Services
Supply Services
BC Mail Plus

Description and Purpose:

The *Postal and Service Delivery ORCS* covers all operational records created, received, and maintained by BC Mail Plus.

The records document postal and service delivery to ministries, the broader public sector and publicly-funded agencies. These services include postal services, scanning, printing, digital card production and relocation services.

This ORCS supersedes ongoing records schedule 107548.

For more information, see attached schedule.

RECEIVED

MAR 01 2011

INFORMATION
SS OPERATIONS

Date range: January 1, 1943	**Physical format of records: see attached schedule**
Annual accumulation: 3.5 cubic meters	

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

THE UNDERSIGNED ENDORSE THE RECOMMENDATIONS:		THE SELECT STANDING COMMITTEE ON PUBLIC ACCOUNTS APPROVES THE RECOMMENDATION OF THE PUBLIC DOCUMENTS COMMITTEE:
Records Officer	Feb 2, 2011 Date	NOV 02 2011
Executive Director/ADM	Feb 15/2011 Date	Date
Deputy Minister/Corporate Executive	Feb 20/11 Date	APPROVED BY RESOLUTION OF THE LEGISLATIVE ASSEMBLY:
THE PUBLIC DOCUMENTS COMMITTEE CONCURS:		MAY 31 2012
Chair, PDC	31 MAR 2011 Date	Date

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

RECORDS MANAGEMENT APPRAISAL:

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

Functional duplicates 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 Records Officer and staff and managers of all branches conducting operational functions in the creating agency.

_____   _____
Mahia Frost, Records Analyst   Date   Jan 31/11

_____   _____
Sarah Shea, Team Lead, ORCS Development   Date   Feb 1/11

ARCHIVAL APPRAISAL:
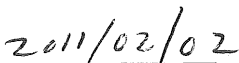
This appraisal documents the recommendation for final disposition.

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

Record series or groups of records which will be retained in their entirety are indicated by "Full Retention". This provides that records will be preserved in the government archives, and that unnecessary duplicates, transitory materials, and ephemera may be discarded.

_____   _____
Linda Nobrega, Archivist   Date   2011/01/28

The undersigned endorses the appraisal recommendations:

_____   _____
Glen Isaac, Manager, Policy, Appraisal and Storage   Date   2011/02/02

A   SA   FD

POSTAL AND SERVICE DELIVERY

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

EXECUTIVE SUMMARY

This *Operational Records Classification System (ORCS)* establishes a classification system and retention and disposition schedule for the operational records created by BC Mail Plus, Ministry of Citizens' Services.

These records document records relating to postal and service delivery to ministries, the broader public sector and publicly-funded agencies. The provision of these services is on a chargeback basis, using a combination of internal and private sector resources. These services include: postal services; scanning; printing; digital card production; and relocation services.

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

This *ORCS* covers records created and received since January 1, 1943, when the Postal and Distribution Services organization was created. This ORCS supersedes ongoing records schedule 107548.

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

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 government policy and procedures. For assistance, contact your Records Officer.

		A	SA	FD

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

		A	SA	FD
1)	Policy and Procedures (secondary -00 throughout *ORCS*)	SO	5y	FR

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

		A	SA	FD
2)	Bulletins and notifications to customers (secondary 14100-03)	SO	3Y	FR

These records are communications to the customers advising of rate changes, recommendations on process, and services provided.

FR =   The government archives will fully retain bulletins and notifications (newsletters) to customers because they document the communication of services, advice and current issues to clients.

		A	SA	FD
3)	Satisfaction survey final reports (secondary 14100-10)	SO	nil	FR

These records assess client satisfaction levels with the services provided by BC Mail Plus.

FR =   The government archives will fully retain the satisfaction survey reports as they document detailed findings and analysis of client feedback on the branch's services.

		A	SA	FD
4)	Customer master data (secondary 14100-05)	FY+7y	nil	DE

These records are customer billing, delivery, change history and address information held on the Systems Applications and Products (SAP) system.

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		A	SA	FD
5)	Facility security records and data			
	(secondary 14200-04)	CY	7y	DE
	(secondaries 14200-09, and -12)	CY+1y	nil	DE

These records document access to the facility, covering both unescorted access to the entire facility (through the granting of a security card) and any access to the secure card production facility; and security monitoring reports, which log security events.

8y = The retention period satisfies the terms of the digital identification cards production contract which stipulate that facility access records are to be retained for seven years.

6)	Prepaid supplies sales case files			
	(secondary 14400-20)	FY+1y	6y	DE

These records document supplies sold by BC Mail Plus to customers, such as stamps and prepaid envelopes.

8y = The retention period ensures records are kept for a sufficient period for fiscal accountability.

7)	Cheque tracking and inventory control			
	(secondary 14500-02)	FY+1y	6y	DE

These records document the inventory control of cheque stock, and details of all print jobs utilizing the stock.

8y = The retention period ensures records are kept for a sufficient length of time for fiscal and operational accountability.

8)	Rate and price setting files			
	(secondaries 14600-20 and -25)	SO+1y	6y	DE

These records document rates charged to customers for services

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			A	SA	FD

rendered and the analysis performed in setting those rates. Also covers covers pricing and job analysis for special projects which BC Mail may bid on through an RFP process.

SO =   for price setting case files, when new prices are established; for special project pricing case files, when project is rejected, or if approved, when project is complete

7y =   The retention period ensures the records are available for fiscal accountability, and retains evidence of authority to change prices.

			A	SA	FD
9)	Relocation records (secondaries 14650-20 and -25)		SO+1y	6y	DE

These records document employee household moves, covering details of each move job and files for each moving company.

SO =   for move job case files, upon completion of move; for moving companies case files, when company is no longer providing service

7y =   The retention period ensures the records are available for fiscal accountability.

					FD
10)	Electronic Records				DE

The following electronic databases are covered by this *ORCS*: the Cheque Tracking and Inventory Control Database, the Morse Watchmens KeyWatcher System, and the Request for Change Database. The Information System Overview section provides information about the electronic systems, inputs and outputs and routine back-ups. Notes under the relevant *ORCS* secondaries provide information about the classification and scheduling of the records. These records have no enduring value to government at the end of their scheduled retention periods.

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<div align="right">

A   SA   FD

</div>

11)   <u>All Other Records</u>   DE

All other records are destroyed at the end of their semi-active retention periods. The retention of these records varies depending on the nature of the records and the function performed, but does not exceed seven years. The information these records contain is summarized elsewhere, or reflects policies and procedures adequately documented in records covered by the -00 Policy and procedures secondaries. Significant issues are documented in records which will be retained under the provisions of this *ORCS,* as well as in briefing notes to the ministry executive (*ARCS* secondary 280-03) and Ministry of Citizen's Services annual reports (*ARCS* secondary 442-20). These records have no enduring value to government at the end of their scheduled retention periods.

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2012/05/31   Schedule 181056   *PSDE ORCS*   EXEC SUMMARY - 7

POSTAL AND SERVICE DELIVERY

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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INTRODUCTION TO THE

POSTAL AND SERVICE DELIVERY ORCS

For further information, call your Records Officer,
Bea Nacey, 250-387-4594

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 government policy and procedures. For assistance, contact your Records Officer.

1. **General**

    This introduction provides an overview of the functions and activities documented in records classified and scheduled under the *Postal and Service Delivery Operational Records Classification System* (*PSDE ORCS*).

    For general information about the purpose, organization, and elements of *ORCS* in general, and of the *Administrative Records Classification System* (*ARCS*), see the *ARCS and ORCS User Guide* available on BC Government's Records Management web site at http://www.gov.bc.ca/citz/iao/records_mgmt/arcs_orcs/. It is designed to help you understand, interpret and use *ARCS* and *ORCS*.

    For special schedules that cover records that are not covered by *ARCS* and *ORCS*, see http://www.lcs.gov.bc.ca/cimb/special/default.asp.

    For legislation, policies, and standards for managing records in the BC Government, see http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/.

    For tips, guides, and FAQs on related topics, see http://www.gov.bc.ca/citz/iao/records_mgmt/guides/.

2. **Overview of this *ORCS***

    The operational records in this *ORCS* relate to the operations and services provided by your ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or policy.

    This *ORCS* has the following parts:
    - Executive Summary:
        - a copy of the signed records retention and disposal authority (ARS 008) form
        - a high-level overview of the *ORCS*
        - a register of approved formal or administrative amendments
    - Table of Contents
    - Introduction (this section)
    - Section 1 and any other numbered sections with classifications and schedules for the records covered by this *ORCS*; see part 3 below for further information
    - Information System Overview Section:
        - descriptions of complex electronic systems and web sites
        - may also include a list of simple systems
    - Index
    - Appendices: may be added to provide file codes, ongoing accession numbers, filing procedures, and/or other classification or records management guidelines

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3. **The Functions and Activities Covered by this *ORCS***

Section Number	Primary Numbers	Section Title
Section 1	14000-14999	POSTAL AND SERVICE DELIVERY

Covers records relating to the provision of postal and service delivery to ministries, the broader public sector and publicly-funded agencies. These services include: postal services; scanning; printing; digital card production; and relocation services. This section also covers records relating to: relations with external service providers, commonly called suppliers, and customers; rate and price setting, and facility security

4. **Legal Authority of this *ORCS***

Under provisions of the *Document Disposal Act* (RSBC 1996, c. 99), this *ORCS* has been reviewed and endorsed by the following authorities:

- government archivists
- your executive
- the Public Documents Committee
- the Select Standing Committee on Public Accounts

Upon approval by the Legislative Assembly, this ORCS becomes a legally binding document, i.e., it has statutory authority governing the retention and disposition of the records that it covers.

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<u>A</u>   <u>SA</u>   <u>FD</u>

S E C T I O N   1

POSTAL AND SERVICE DELIVERY

P R I M A R Y   N U M B E R S

1 4 0 0 0 - 1 4 9 9 9

Section 1 covers records relating to the provision of postal and service delivery to ministries, the broader public sector and publicly-funded agencies. The provision of these services is on a chargeback basis, using a combination of internal and private sector resources. These services include: postal services; scanning; printing; digital card production; and relocation services. This section also covers records relating to: relations with external service providers, commonly called suppliers, and customers; rate and price setting, and facility security.

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A   SA   FD

SECTION 1

14000 - POSTAL AND SERVICE DELIVERY - 14999

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			<u>A</u>	<u>SA</u>	<u>FD</u>

14000   <u>POSTAL AND SERVICE DELIVERY – GENERAL</u>

Records relating generally to the provision of postal and service delivery to ministries, the broader public sector and publicly-funded agencies, and not shown elsewhere in the Postal and Service Delivery section.

This primary also covers the scheduling of the superseded Mail Plus System and related data.

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

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

For BC Mail Plus web pages, see *ARCS* secondary 340-30.
For internal circulars, see *ARCS* primary 195.
For the administration of government road vehicles, see *ARCS* primary 877.

	A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Mail Plus) will retain these records for:	FY+1y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>

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

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

-01   General

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			A	SA	FD

14000   POSTAL AND SERVICE DELIVERY – GENERAL (continued)

-04	BC Mail Plus monthly performance reports	SO	3y	DE

SO =   when no longer required for operational and reference purposes

NOTE: Monthly performance reports summarize BC Mail Plus activities, financial, cost (Cost of Goods Sold) comparative and sales analysis, volume reports and FTE reports.

DE =   The monthly performance reports may be destroyed because it is a divisional report (Logistics and Business Services) of which BC Mail Plus is one component of. The reports are intended for management and are documented under the Executive Records Schedule (102906).

-08	Mail Plus System data (covers electronic data within the Mail Plus System) (electronic records)	SO+3y	nil	DE

SO =   March 31, 2010, when the Mail Plus System was decommissioned

NOTE: This secondary is not for filing. It is used to schedule the data within the system.

-09	Mail Plus System (electronic database)	SO	nil	DE

SO =   upon expiry of the Mail Plus data, classified under 14000-08

DE =   This electronic system can only be destroyed when the approved retention schedules covering the information on them have elapsed, or when the information has been made accessible elsewhere.

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			A	SA	FD

14000   <u>POSTAL AND SERVICE DELIVERY – GENERAL</u> (continued)

NOTE: The Mail Plus System was a billing, delivery and job planning and inventory system that was core to the organization's functions until it was replaced by SAP, and decommissioned March 31 2010. Some, but not all, of the data was migrated to SAP. Consequently, the system will be kept for reference purposes until the expiry of the retention period for the Mail Plus data.

NOTE: This secondary is not for filing. It is used to schedule the system itself.

-13   Postal and service delivery reference materials   SO   nil   DE

SO =   when no longer required for operational and reference purposes

NOTE: This secondary covers a collection of reference materials on topics such as international mail, non-admissible items, or shipment of dangerous goods, which are collected for reference purposes only and do not include records generated by BC Mail Plus.

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			<u>A</u>	<u>SA</u>	<u>FD</u>

14100   <u>CUSTOMER / SUPPLIER LIAISON</u>

Records relating to liaison and communication with suppliers of services and customers of BC Mail Plus. This involves the exchange of information and general announcements, notifications and satisfaction surveys, issue resolution, which includes strike planning and other issues relating to services provided by BC Mail Plus.

This primary also includes records relating to the establishment and maintenance of customer account information, including billing and delivery account information in the SAP System, and supplying direct access accounts for customers to suppliers.

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

For BC Mail Plus web pages, see *ARCS* secondary 340-30.
For internal circulars (staff notices), see *ARCS* primary 195.
For Memoranda of Understanding (MOU), see *ARCS* primary 146.
For the SAP Information System Overview (ISO), see ISO section.
For supplier contracts and agreements, see *ARCS* primary 1070.

			A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Mail Plus) will retain these records for:			FY+1y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:			<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Customer account code changes (covers annual review and update of customer's accounting codes)				
-03	Bulletins and notifications to customers		SO	3y	FR

        FR =   The government archives will fully retain bulletins and notifications (newsletters) to customers because they document the communication of

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		<u>A</u>	<u>SA</u>	<u>FD</u>

14100   <u>CUSTOMER / SUPPLIER LIAISON</u>

services, advice and current issues to clients.

-04	Customer information products	SO	3y	DE

(covers communication materials such as customer information packages and guides, organizational overviews, and frequently asked questions)

DE =   The customer information products may be destroyed because they are marketing tools that document the services provided by the branch and is well documented under the policy and procedure secondaries.

-05	Customer master data	FY+7y	nil	DE

(covers customer billing, delivery, change history and address information held on SAP)
(electronic records)

8y =   The retention period provides sufficient time to verify authority for changes, conduct client searches, and to cover an audit cycle.

NOTE: This secondary is not for filing. It is used to schedule the data within the database.

-10	Satisfaction survey final reports	SO	nil	FR

(covers final report and one copy of the questionnaire)

FR =   The government archives will fully retain the satisfaction survey reports as they document detailed findings and analysis of client feedback on the branch's services.

-12	Service location updates	FY+2y	nil	DE

(includes service location update forms and correspondence)
(arrange numerically by region)

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		A	SA	FD

14100   CUSTOMER / SUPPLIER LIAISON

> NOTE: Commonly called checklists, these forms cover changes in SAP to customer account information, such as initiation of service, address changes, delivery changes or stoppage of service.

> 3y =   The retention period provides sufficient time to verify authority for changes and conduct client searches.

		A	SA	FD
-20	Child account management case files (arrange by supplier, then in chronological order)	SO+1y	nil	DE

> SO =   when account is closed

> NOTE: This secondary covers the establishment of child accounts, which are customer accounts set up under the umbrella of BC Mail Plus's accounts with suppliers such as Canada Post (Express Order Entry) or other suppliers, giving the customer group rates, and enabling them to order services or supplies, such as business reply envelopes or courier waybills, directly from supplier.

| -25 | Customer/supplier issue files (covers correspondence, strike plans, and issue resolution with suppliers such as Canada Post, Purolator, moving companies, or with BC Mail Plus customers) (arrange by supplier or customer name) | SO+1y | 5y | DE |

> SO =   when issue is resolved or abandoned

| -30 | Customer/supplier liaison files (covers general correspondence and liaison material with BC Mail Plus customers and suppliers such as Canada Post, Purolator, Xerox, moving companies, or with BC Mail Pus customers) (arrange by supplier or customer name) | SO | nil | DE |

(continued on next page)

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		<u>A</u>	<u>SA</u>	<u>FD</u>

14100   <u>CUSTOMER / SUPPLIER LIAISON</u>

SO =   when no longer required for operational and reference purposes

NOTE: For supplier or customer issues, see secondary 14100-25 (Customer/supplier issue files).

-40	Satisfaction surveys (includes survey development and completed questionnaires) (arrange by survey date)	SO+1y	3y	DE

SO =   when survey is completed

NOTE: Final survey reports and one copy of the corresponding questionnaire will be classified and fully retained under secondary 14100-10 (Satisfaction survey final reports).

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			<u>A</u>	<u>SA</u>	<u>FD</u>

14200   FACILITY SECURITY

Records relating to the operation and monitoring of physical security for BC Mail Plus facilities. The primary covers access authorizations and databases for key control and physical access, as well as control logs maintained by security personnel.

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

For equipment history files, including troubleshooting and procedural
       records, see *ARCS* secondary 700-20.
For the Lenel Security System Information System Overview (ISO),
       see the ISO section.
For photograph management, see *ARCS* secondary 306-20.
For physical security measures, see *ARCS* secondary 470-30.
For security incident investigations, see *ARCS* secondary 470-20.
For security training records, see *ARCS* primary 1735.
For surveillance recordings, see *ARCS* secondary 470-10.

	A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Mail Plus) will retain these records for:	CY	2y	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:	<u>SO</u>	<u>nil</u>	<u>DE</u>

				A	SA	FD
	-00	Policy and procedures	- OPR	SO	5y	FR
			- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
	-01	General				
PIB	-04	Facility access records		CY	7y	DE

          (covers records relating to granting access to the secure sections of the facility, such as correspondence regarding tours of card production facility, and logs: after hours sign-in and out, card issue, key issue, and incident and temporary card issuance logs which are maintained by security personnel)
          (arrange chronologically by month)

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			<u>A</u>	<u>SA</u>	<u>FD</u>

14200   <u>FACILITY SECURITY</u> (continued)

8y =   The retention period satisfies the terms of the digital identification cards production contract which stipulate that facility access records are to be retained for seven years.

NOTE: If a security investigation arises from an incident, the investigation file will be classified under *ARCS* primary 470.

PIB	-06	Master security spreadsheets (covers spreadsheets shared with security personnel listing access permissions, protocols and passcard numbers for secure facility areas)	SO	nil	DE
PIB	-09	Physical access control system data (electronic records)	CY+7y	nil	DE

8y =   The retention period satisfies the terms of the digital identification cards production contract which stipulate that facility access records are to be retained for seven years.

NOTE: This secondary covers electronic data within the facility security systems, currently the Lenel Security System and Morse Watchmens KeyWatcher System.

NOTE: This secondary is not for filing. It is used to schedule the data within the systems.

NOTE: See the Simple System Listing in the ISO section for the Morse Watchmens KeyWatcher System.

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<u>A</u>   <u>SA</u>   <u>FD</u>

14200   <u>FACILITY SECURITY</u> (continued)

-11   Security activity records - not access related
(includes correspondence regarding general tours, and security logs such as visitors sign-in and out sheets)
(arrange chronologically by month)

NOTE: This secondary covers records regarding escorted visitors to the general areas of the facility, including tours, and related logs maintained by security personnel. Records involving unescorted access to the general areas of the facility, or any access to the card production facility, will be classified under secondary 14200-04.

NOTE: Delivery driver logs are classified under secondary 14400-06 (Driver logs).

-12   Security monitoring reports   CY+7y nil   DE
(covers event reports produced by security personnel)
(arrange by type of event)

8y =   The retention period satisfies the terms of the digital identification cards production contract which stipulate that facility access records are to be retained for seven years.

-20   Security clearance case files   SO+1y nil   DE
(covers confirmation of security clearance, including temporary clearance, and correspondence confirming or revoking access to facility)
(arrange by company, or by employee)

SO =   upon expiry of clearance or date of decision to deny clearance

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			<u>A</u>	<u>SA</u>	<u>FD</u>

14400   POSTAL SERVICES

Records relating to the provision of postal services. Postal services include mail processing and distribution, i.e. mail delivery and pick up at customer locations; mail processing; mail distribution via contracted carriers; and house mail, an internal mail distribution network which services offices in cities and towns throughout the province.

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

For box rental invoices, see *ARCS* primary 925.
For callout sheets, see *ARCS* primary 1550.
For complaints, see secondary 14100-25.
For customer delivery changes, see secondary 14100-20.
For form development and management, see *ARCS* primary 285.
For liaison with postal suppliers, see primary 14100.
For mail preparation and processing, see primary 14500.
For postage meter equipment files, see *ARCS* primary 700.
For postage meter inventory and billing, see *ARCS* primary 925.
For rates and price setting, see primary 14600.
For the SAP Information System Overview (ISO), see ISO section.
For variable data print services, see primary 14500.

			A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Mail Plus) will retain these records for:			FY+1y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:			<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-04	Delivery routes (covers delivery points and schedules held in SAP) (electronic records)		SO	nil	DE

SO =   when route changes

(continued on next page)

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		A	SA	FD

14400   POSTAL SERVICES (continued)

> NOTE: Routine disposition of delivery route reports printed from SAP is authorized under the Transitory Electronic Data Processing (EDP) Records (schedule 102902), section 2.3, Transitory Output Records.

-06   Driver logs
(covers the daily logs of delivery units/phones/keys issued to drivers, maintained by security personnel)

-11   Mail tickets   FY+2y nil   DE
(covers electronic images of mail tickets scanned daily through Teleform and the metadata uploaded into SAP)

3y =   The retention period ensures records are kept for a sufficient length of time for dispute resolution. Ministry clients can only make billing inquiries within the billing fiscal year, and non ministry clients for two fiscal years after being invoiced.

> NOTE: See Appendix A for the Records Officer's authorization for the routine destruction of scanned paper mail tickets.

-20   Prepaid supplies sales case files   FY+1y 6y   DE
(covers supplies sold by BC Mail Plus, for example stamps and prepaid envelopes)
(includes orders, correspondence, stock on hand reports, delivery and trace records)
(arrange by assigned sequential number)

8y =   The retention period ensures records are kept for a sufficient period for fiscal accountability.

(continued on next page)

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			A	SA	FD
14400	POSTAL SERVICES (continued)				
-35	Processed source documents		SO	3y	DE
	(includes miscellaneous service documentation, courier waybills and manifests, registered mail, business reply daily log, and driver delivery confirmation slips)				
	(arrange by batch date)				

SO =   upon information being entered or scanned into SAP

3y =   The retention period ensures records are kept for a sufficient length of time for dispute resolution. Ministry clients can only make billing inquiries within the billing fiscal year, and non ministry clients for two fiscal years after being invoiced.

NOTE: The OPR will store processed source documents under ongoing RCS accession number 91-0263.

NOTE: This secondary replaces approved ongoing records schedule 107548.

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A   SA   FD

14500   SERVICE DELIVERY

Records relating to the provision of project or job-based services to ministry/agency clients, including:

- Digital Identification Card Production: The production of both photographic and non-photographic digital identification cards produced under contract with IBM, such as Driver's Licenses, BCID (BC Identification) cards, security badges or other cards. Electronic files containing the images and relevant data are received by BC Mail Plus on a scheduled basis from IBM. The cards are produced onsite, verified for accuracy, then mailed to the responsible ministry/agency/client.

- Technical Consultative Services: The provision of technical consultative services to ministry/agency clients. Referred to as document development or application development, these services are conducted by system analysts who work with clients to coordinate projects such as print jobs, forms design and changes, (using the Reqest for Change database for tracking), scanned projects and mail distribution jobs. One project can contain multiple processes from variable data print services through to postal services.

- Variable Data Print Services (VDPS): Variable data print is when electronic documents are merged with variable data at print time to create personalized documents. VDPS provides a complete printing and distribution service, which includes printing, production control and scheduling, and forms inventory and management. Documents printed include cheques, statements, letters, forms, and reports.

- "Mail Prep": BC Mail Plus utilizes a combination of high speed mechanical processing equipment and private sector contractors to meet customer's bulk mail preparation requirements for volume mailings. Services include address data analysis, folding, inserting, and addressing, and distribution of printed products. Records cover production details for ongoing jobs such as rural property taxes, MSP, cheques and mailouts.

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		<u>A</u>	<u>SA</u>	<u>FD</u>

14500   <u>SERVICE DELIVERY</u> (continued)

- <u>Scanning Services/Special Projects</u>: Includes high speed document scanning services, optical character recognition (OCR) processing, and evaluation of scanned images. Documents scanned include the daily mail tickets for billing purposes, as well as contracted projects such as petitions, surveys, and mark checking exams for the Ministry of Education.

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

For accounts receivable billing, see *ARCS* primary 935.
For the Avanti Information System Overview (ISO), see the ISO
     section.
For callout sheets, see *ARCS* primary 1550.
For contracts, see *ARCS* primary 1070.
For postal services, see primary 14400.
For rates and price setting, see primary 14600.
For relocation services, see primary 14650.
For security logs, see primary 14200.

		A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Mail Plus) will retain these records for:		FY+1y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:		<u>SO</u>	<u>nil</u>	<u>DE</u>
-00 Policy and procedures	- OPR	SO	5y	FR
	- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01 General				
-02 Cheque tracking and inventory control (includes logs, correspondence, stock inventory sheets, bank standards, cheque renumbering sheets and data on the Cheque Tracking and Inventory Control database)		FY+1y	6y	DE

      8y =   The retention period ensures records are kept for a sufficient length of time for fiscal and operational accountability.

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			<u>A</u>	<u>SA</u>	<u>FD</u>

14500   <u>SERVICE DELIVERY</u> (continued)

NOTE: See the Simple System Listing in the ISO section for the Cheque Tracking and Inventory Control Database.

-07	Operational and issue logs (covers logs such as: monthly issue logs, error logs, job schedule logs, click count logs, certification logs, shipping logs, and stock and maintenance logs)	SO	nil	DE

SO =   when no longer required for operational and reference purposes

-10	Request For Change (RFC) data (covers data stored in the RFC database) (electronic records)	SO	nil	DE

SO =   when no longer required for operational and reference purposes

NOTE: This secondary is not for filing. It is used to schedule the data within the database.

NOTE: See the Simple System Listing in the ISO section for the Request For Change Database.

-12	Supplies inventory (covers inventory records regarding supplies such as paper/envelopes/pre-paid supplies, including inventory data held in Avanti and SAP) (paper and electronic records)	FY+3y	nil	DE

(continued on next page)

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			A	SA	FD

14500   SERVICE DELIVERY (continued)

			A	SA	FD
-25	Planning and production case files		SO+1y	3y	DE

          (covers application development, production planning, scanning projects, card production projects, mail prep and print jobs)
          (includes job control sheets, billing information, supplier information, procedural documentation, envelope artwork, templates, correspondence, Customer Service Requests (CSR's), stock samples, programming reports, templates, mailing lists, server confirmation reports and data in Avanti and SAP)
          (arrange by card type for card production projects; by service request number for production planning, by request for change number for application development; by ministry, then by project for all other projects)
          (paper and electronic)

SO =   when job changes significantly, or when job is complete and records are no longer required for operational and reference purposes

4y =   The retention period ensures records are kept for a sufficient period for dispute resolution. Ministry clients can only make billing inquiries within the billing fiscal year, and non ministry clients for two fiscal years after being invoiced.

NOTE: For audit purposes mail prep jobs are kept as a whole, even though parts of the file are essentially processed source documents (see secondary 14400-35).

NOTE: Scanning project files contain job details and correspondence surrounding issues that may arise during the project. They do not contain actual project material, such as completed exams or mail tickets.

NOTE: See Appendix A for the Records Officer's authorization for the routine destruction of customer job data.

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	A	SA	FD

14600   RATE AND PRICE SETTING

Records relating to rates charged to customers for services rendered and the analysis performed in setting those rates. Customers include ministries, the broader public sector and publicly-funded agencies. BC Mail Plus operates as a fully cost recoverable program; expenditures are recovered from customers through a chargeback process.

NOTE: This primary does not document the payment of fees or chargebacks which are classified under the appropriate *ARCS* classifications.

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

For accounts receivable invoices, see *ARCS* primary 935.
For the Avanti Information System Overview (ISO), see the ISO section.
For chargeback billing, see *ARCS* primary 1050.
For customer bulletins, see secondary 14100-03.
For the SAP Information System Overview (ISO), see the ISO section.

			A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Mail Plus) will retain these records for:			FY+1y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:			<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-20	Price setting case files (covers tariffs, blended rate and other pricing changes) (includes notifications from suppliers, financial analyses, option papers and correspondence) (arrange by fiscal year, then by client, if applicable)		SO+1y	6y	DE

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		A	SA	FD

14600   RATE AND PRICE SETTING (continued)

       SO =   when new prices are established

       7y =   The retention period ensures the records are available for fiscal accountability, and retains evidence of authority to change prices.

       NOTE: Communications to customers regarding pricing changes are classified under secondary 14100-03 (Customer bulletins and notifications).

		A	SA	FD
-25	Special project pricing case files (covers pricing and job analysis for projects outside of the day to day services provided by BC Mail Plus) (includes statement of work agreement, RFP submission, planning and analysis documents, and correspondence) (arrange by project)	SO+1y	6y	DE

       SO =   when project is rejected, or if approved, when project is complete

       7y =   The retention period ensures the records are available for fiscal accountability purposes.

       NOTE: Project agreements with customers will be classified under *ARCS* secondary 146-45 (Approved internal and local agreement files).

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		<u>A</u>	<u>SA</u>	<u>FD</u>

14650   RELOCATION SERVICES

Records relating to relocation services. Employee household moves can be arranged for all regular and excluded staff, including new and mobile employees, and on behalf of any ministry or funded agency of the provincial government.

This function covers:
- Working with the moving firm and the employee to facilitate the move, including reviewing estimates, providing guidelines, issuing the contract and paying the invoice
- Negotiating tariff rate structures with major Canadian van lines
- Managing a register of approved moving firms for the provision of household moving services throughout the province.

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

For accounts payable, see *ARCS* primary 925.
For accounts receivable, see *ARCS* primary 935.
For records relating to rates and pricing, see primary 14600.
For the SAP Information System Overview, see the ISO section.

			A	SA	FD
Unless otherwise specified below, the ministry OPR (BC Employee Relocation Services) will retain these records for:			FY+1y	nil	DE
Except where <u>non-OPR retention periods</u> are identified below, all other ministry offices will retain these records for:			<u>SO</u>	<u>nil</u>	<u>DE</u>
-00	Policy and procedures	- OPR	SO	5y	FR
		- <u>non-OPR</u>	<u>SO</u>	<u>nil</u>	<u>DE</u>
-01	General				
-02	Annual relocation tariff reviews				
-06	Fuel surcharges for movers				
-12	Register of companies and districts		SO	nil	DE

SO =   when no longer required for operational and
reference purposes

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		A	SA	FD

14650   RELOCATION SERVICES (continued)

		A	SA	FD
-13	Relocation terms and conditions	SO	nil	DE

SO =   when terms and conditions are updated and reference value has expired

		A	SA	FD
-20	Move jobs case files (includes estimates, evaluations, checklists, storage information, moving plans, copies of contracts, Employee Move Authorizations [FIN 191], copies of invoice, and bills of lading) (arrange by SAP number)	SO+1y	6y	DE

SO =   upon completion of move

7y =   The retention period allows for fiscal accountability.

		A	SA	FD
-25	Moving companies case files (includes confirmation of professional affiliations and WCB information, security provisions and protocol, correspondence, terms and conditions, and service reviews) (arrange by company name)	SO+1y	6y	DE

SO =   when company is no longer providing service

7y =   The retention period allows for fiscal accountability.

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INFORMATION SYSTEM OVERVIEW SECTION

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SIMPLE SYSTEM LISTING

Simple Systems

Cheque Tracking and Inventory Control Database

Purpose: This in-house database created in MS Access contains current information as well as data migrated from the Mail Plus System regarding the inventory control of cheque stock, and a summary of all jobs utilizing the stock.

Data Classification: 14500-02   Cheque tracking and inventory control data

Morse Watchmens KeyWatcher System

Purpose: This off the shelf sophisticated locking device system holds security cards and keys assigned to employees or contractors requiring access to high security areas or off-hours access to the facility. Data on this system consists of names and access levels of authorized staff and contractors having access to the cards and keys in this system and transactional data regarding card and key removal and return.

Data Classification: 14200-09   Physical access control system data

Request For Change Database

Purpose: This in-house database created in MS Access tracks the status of requests for changes to forms developed by the application development unit. It tracks client contact information, name of form, description of change, hours billed and status of job.

Data Classification: 14500-10   Request For Change (RFC) data

System Scheduling and Disposition
Simple systems will be destroyed when the functions they support are no longer performed by the provincial government, and when the approved retention schedules covering the information on them have elapsed, or the information has been preserved elsewhere. If all data is migrated to a new system performing the same function, this schedule applies to the new system and the old system may be destroyed upon authorization of the Records Officer.

INFORMATION SYSTEM OVERVIEW

Name of Creating Agency
Ministry of Citizens' Services
Logistics and Business Services
Supply Services
BC Mail Plus

System Title
Avanti

Purpose
The purpose of Avanti is to support business workflow processes. Avanti is used as a planning and job control tool from the production planning phase through to completion of mail preparation (mail prep) jobs. It also tracks inventory used per job and is used as an overall inventory tracking tool.

Information Content
Avanti contains the following information: mail prep job details such as customer information, job parameters, billable hours, and inventory used; pricing information, and product inventory.

Inputs, Processes, and Outputs
   Inputs
Job details such as customer information, job parameters and required inventory are inputted manually into Avanti, and updated as job progresses. Pricing and inventory information is entered into master tables which Avanti uses to calculate costs.

   Processes
As jobs are requested, the planners outline the parameters of the job in Avanti, with estimated time and inventory necessary. Avanti assigns the job number and produces the job control sheet, which outlines all job details, and is used as the core document for the job as it progresses through its processes. As the job is completed, details such as volume, hours dedicated, and inventory used are updated in the system if necessary, and the summary information is uploaded into SAP for billing purposes.

   Outputs
Outputs from Avanti consist of job control sheets, inventory reports, ad hoc reports, and billing information uploaded into SAP.

Classification

   Electronic System
This electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

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 government policy and procedures. For assistance, contact your Records Officer.

Electronic Records

Secondary No.	Secondary Title
14500-12	Supplies inventory
14500-25	Planning and production case files

Inputs

Secondary No.	Secondary Title
14500-25	Planning and production case files
14600-20	Price setting case files
14600-25	Special project pricing case files

Outputs

Secondary No.	Secondary Title
14500-07	Operational and issue logs
14500-25	Planning and production case files

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see *ARCS* secondary 6820-05.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

Avanti will be destroyed when the functions it supports are no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed; or the information has been preserved elsewhere.

INFORMATION SYSTEM OVERVIEW

Name of Creating Agency
> Ministry of Citizens' Services
> Logistics and Business Services
> Supply Services
> BC Mail Plus

System Title
> Lenel Security System

Purpose
> The Lenel Security System (Lenel) is used to manage the physical security of the BC Mail Plus Victoria facility. The system consists of three components:

> - Access Control System – defines access privileges for authorized personnel to enter the building and/or a specific area within the building
> - Closed Circuit Television System (CCTV) – records in real time and stores video images for later retrieval and review
> - Intrusion Alarm System – includes devices such as door contacts, motion detectors and glass break detectors used to detect unauthorized access to or within the building.

> Its purpose is to control access to the building through defined profiles, and catalogue individual's access to the secured facility; monitor and record events from alarms and access control devices (e.g., card readers and keypads); and alert security staff if an unauthorized or abnormal event is registered.

Information Content
> The Lenel System contains individual's names and associated identifying photographs, as well as their authorized access levels. The system records all alarm and access control device activities (events), including images captured by the closed circuit TV.

Inputs, Processes, and Outputs

> **Inputs**
> Inputs into the Lenel system consist of output from card reader's and access control devices and manual entry of individuals' names, photos, card numbers and access authorization levels, as well as maintenance of system master files, such as access levels and card readers.

> **Processes**
> If an event meets the criteria of a security event the system triggers the alarm, and records the activity.

> The Lenel System is also used to program swipe cards issued to staff and record their usage.

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 government policy and procedures. For assistance, contact your Records Officer.

Outputs

Outputs consist of alarm messages, popup video messages, event reports, ad hoc reports, cardholder lists, and new or replacement cards.

Classification

Electronic System

This electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Schedule	Secondary No.	Secondary Title
100001 (ARCS)	470-10	Surveillance recordings
181056 (PSDE)	14200-09	Physical access control system data

Inputs

Schedule	Secondary No.	Secondary Title
100001 (ARCS)	306-20	Audio-visual and graphics management
181056 (PSDE)	14200-10	Physical access control system data
181056 (PSDE)	14200-20	Security clearance case files

Outputs

Secondary No.	Schedule	Secondary Title
100001 (ARCS)	470-10	Surveillance recordings
100001 (ARCS)	470-20	Security incident investigations
181056 (PSDE)	14200-12	Security monitoring reports
181056 (PSDE)	14200-04	Facility access records

Other Related Records

- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see *ARCS* secondary 6820-05.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The Lenel System will be destroyed when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

INFORMATION SYSTEM OVERVIEW

Name of Creating Agency
> Ministry of Citizens' Services
> Logistics and Business Services
> Supply Services
> BC Mail Plus

System Title
> Systems Applications and Products (SAP)

Purpose
> SAP is a complex enterprise resource planning software system that supports the financial transactions and reporting, inventory management and purchasing, sales and distribution services provided by the Logistics and Business Services Division.
>
> The use of SAP by BC Mail Plus is to support its business workflow processes. SAP generates the electronic chargeback recovery of postal and other services costs; maintains mail delivery route information for drivers; performs financial transaction reporting; produces ad hoc reports; and manages billing for Avanti.

Information Content
> SAP contains the following data elements:
> - metadata from scanned mail tickets
> - accounts payable and receivable records
> - sales and statistical data for reporting
> - postage meter counts
> - master customer information
> - pricing information, including rates
> - product inventory
> - delivery routes, driver/supervisor timetables and locations
> - all details for each relocation job, from specifications to billing information
> - history of all information as it is changed

Inputs, Processes, and Outputs
> Inputs into SAP are entered both manually and via automated system uploads as customer information changes. Once in the system, the billing information is "rolled up" monthly in order to generate invoices, which are sent directly to the client, and then summarized in financial reports. SAP also produces sales orders, estimate sheets and purchase orders for relocation services.
>
> **Inputs**
> - Mail Tickets
> - Prepaid supplies order forms
> - Service location checklists
> - Mail preparation job sheets
> - Manual service tickets

- Delivery routes, driver timetables and locations
- Track and Trace mail information
- Business reply daily log
- Employee move authorization forms
- Supplier child accounts

Processes

Information, such as master customer information, is inputted directly into SAP from staff, as well as through automatic system uploads, such as metadata from scanned mail tickets. SAP also interfaces with Avanti (see Avanti ISO in this ISO section) to download customer and supplier information and upload billing information.

SAP generates invoices to charge back for services rendered. These charges are based on the mail tickets and also on the information relating to specific jobs and projects, including relocation jobs.

Outputs

- Monthly customer chargebacks and invoices
- Ad hoc reports such as
    - status reports,
    - transaction reports,
    - financial statements,
    - customer reports,
    - monthly summary reports such as Profit and Loss statements and accounts receivable statements
    - mail ticket reports
- Inventory reports
- Pre-printed mail tickets
- Route reports*
- Relocation estimates and sheets for sign off
- Delivery slips

* Printed route reports of delivery routes are scheduled as a transitory record under Schedule 102902, section 2.3, Transitory Output Records.

Classification

Electronic System

This electronic system is not classified in the *ORCS*. The classifications for the electronic records it generates are listed below. The system schedule is provided under "System Scheduling and Disposition".

Electronic Records

Schedule	Secondary No.	Secondary Title
100001 (*ARCS*)	935-20	Accounts receivable files
181056 (*PSDE*)	14100-05	Customer master data

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 government policy and procedures. For assistance, contact your Records Officer.

181056 (*PSDE*)	14100-20	Child account management case files
181056 (*PSDE*)	14400-04	Delivery routes
181056 (*PSDE*)	14400-11	Mail tickets
181056 (*PSDE*)	14400-20	Prepaid supplies sales case files
181056 (*PSDE*)	14500-25	Planning and production case files
181056 (*PSDE*)	14650-20	Move jobs case files

Inputs

Schedule	Secondary No.	Secondary Title
181056 (*PSDE*)	14100-05	Customer master data
181056 (*PSDE*)	14100-12	Service location updates
181056 (*PSDE*)	14400-35	Processed source documents
181056 (*PSDE*)	14400-04	Delivery routes data
181056 (*PSDE*)	14500-25	Planning and production case files
181056 (*PSDE*)	14600-20	Price setting case files
181056 (*PSDE*)	14600-25	Special project pricing case files
181056 (*PSDE*)	14650-20	Move jobs case files

Outputs

Schedule	Secondary No.	Secondary Title
100001 (*ARCS*)	440-20	Reports and statistics (not covered elsewhere)
100001 (*ARCS*)	440-25	Ad hoc reports
100001 (*ARCS*)	935-20	Accounts receivables files
100001 (*ARCS*)	1180-20	Period-end financial reports
181056 (*PSDE*)	14500-12	Supplies inventory

Other Related Records
- For transitory electronic data processing (EDP) records, see special schedule 102902 in the *ARCS* manual.
- For computer system backup records, see *ARCS* secondary 6820-05.
- For administrative records relating to the system, see *ARCS* section 6 and other relevant primaries.

System Scheduling and Disposition

The SAP system will be destroyed when the function it supports is no longer performed by the provincial government, and when the approved retention schedules covering the information on it have elapsed, or the information has been preserved elsewhere.

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<u>SUBJECT HEADINGS</u>   <u>PRIMARY NUMBERS</u>

POSTAL AND SERVICE DELIVERY

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (*ORCS*)

<u>INDEX</u>

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

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

This index contains an alphabetical listing of:
- a)   all keywords which appear in primary titles;
- b)   all keywords which appear in secondary titles;
- c)   keywords which appear in primary scope notes;
- d)   common synonyms for indexed keywords; and
- e)   common abbreviations.

<u>Cross-references</u>:

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

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

This 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 government policy and procedures. For assistance, contact your Records Officer.

SUBJECT HEADINGS	PRIMARY NUMBERS

- A -

ACCOUNT CODE CHANGES	
- customer	14100
ANNUAL RELOCATION TARIFF REVIEW	14650
APPLICATION DEVELOPMENT	14500
AVANTI SYSTEM	ISO section
- planning and production case files	14500
- supplies inventory	14500

- B -

BULLETINS	
- to customers	14100
BUSINESS REPLY DAILY LOGS	14400

- C -

CARD ISSUE LOGS	14200
CARD PRODUCTION	
- access to facility	14200
- projects	14500
- tours of card production facility	14200
CHECKLISTS	
- move jobs	14650
- service locations	14650
CHEQUE TRACKING AND INVENTORY CONTROL DATABASE	ISO section
CHEQUE TRACKING AND INVENTORY CONTROL	
- bank standards	14500
- cheque renumbering sheets	14500
- database	ISO section
- data	14500
- logs	14500
- stock inventory sheets	14500
CHILD ACCOUNT MANAGEMENT	14100
CLEARANCE FILES	
- security	14200

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(continued on next page)

LOGS (continued)

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SUBJECT HEADINGS	PRIMARY NUMBERS
- job schedule	14500
- key issue	14200
- maintenance	14500
- monthly issues	14500
- shipping	14500
- sign-in and out	14200
- temporary card issue	14200

- M -

MAIL PLUS SYSTEM	14000
- data	14000
MAIL PREP JOBS	14500
MAIL TICKETS	
- electronic images	14400
- scanned paper tickets	Appendix A
MONTHLY PERFORMANCE REPORTS	14000
MOVING COMPANIES	14650
MOVE JOBS	14650

- N -

- O -

- P -

PREPAID SUPPLIES SALES	14400
PRICING	
- changes	14600
- special projects	14600
PRINT DATA	14500
PRINT JOBS	14500
PROCESSED SOURCE DOCUMENTS	14400
PRODUCTION PLANNING	14500

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<u>SUBJECT HEADINGS</u>   <u>PRIMARY NUMBERS</u>

- Q -

- R -

RATE SETTING	14600
REFERENCE MATERIALS	14000
REGISTER OF COMPANIES (RELOCATION)	14650
REGISTERED MAIL	14400

RELOCATION
- move jobs 14650
- moving companies 14650
- register of companies 14650
- tariff reviews 14650
- terms and conditions 14650

REQUEST FOR CHANGE
- database .... ISO section
- data 14500
- forms 14500

REQUEST FOR PROPOSALS (RFP'S)
- for special projects 14600

- S -

SAP SYSTEM .... ISO section
- accounts receivable files .... *ARCS* 935
- customer master data 14100
- child account management case files 14100
- delivery routes 14400
- mail tickets 14400
- move jobs case files 14650
- planning and production case files 14500
- prepaid supplies sales case files 14400

SATISFACTION SURVEYS	14100
SCANNING PROJECTS	14500

SECURITY
- activity records 14200
- clearance case files 14200

SECURITY (continued)

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SUBJECT HEADINGS	PRIMARY NUMBERS

- V -

VISITOR SIGN-IN AND OUT SHEETS	14200

- W -

- X -

- Y -

- Z -

APPENDICES

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APPENDIX A

ROUTINE DESTRUCTION OF RECORDS

By means of this Appendix, and with the authority granted by the *Document Disposal Act*, (RSBC 1996, c. 99, s. 3.2 (c) (ii)), the Ministry Records Officer approves the routine destruction of the records outlined below. These records have been determined to have no enduring value to the organization.

By granting approval in advance for destruction of these records, the process of destroying these records will be done on a scheduled routine basis. Due to the regularity of this process, it would be cumbersome and unnecessary to obtain specific authority prior to each data deletion or records destruction.

With this approval, the following records may be destroyed when they have met the SO criteria as outlined:

Customer job data   **SO   nil   DE**
This is data received from customers for the purpose of completing a job (such as letters forms, and other products for printing and mailing). The customer holds the original record.

Please note that this does not cover the material regarding the request, management and completion of the job; these records are classified under secondary 14500-25 (Planning and production case files).

SO =   upon full completion of customer job

Scanned mail tickets   **SO   nil   DE**
These paper mail tickets have been scanned and the metadata uploaded into SAP. The scanned information is accessible through SAP and is considered the supporting material for the billing process, rendering the paper tickets unnecessary.

SO =   upon completion of scanning, and when accuracy has been verified

---

Bea Nacey, Records Officer
Information Access Operations

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APPENDIX B: ONGOING ACCESSION NUMBERS

See the RIM Glossary for definitions of accession, accession number, and ongoing accession number (OAN):
http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/rim_manual/glossary.html#Accession

Note that each OAN is assigned to only one office. The office authorized to use the OAN must keep track of the last number used in each set of boxes sent offsite, so that the next set of boxes sent can start with the next available number (e.g., boxes 1-25 sent offsite September 2009, boxes 26-31 sent December 2009, and so on).

Your Records Officer has assigned ongoing accession numbers covering records classified under this *ORCS* to the following categories of records:

OAN	Primary and Secondary No.	Primary and/or Secondary Title	Office authorized to use the OAN
91-0263	14400-35	Processed source documents	BC Mail Plus, Victoria office

For further information about ongoing accession numbers, contact your Records Officer.