



Tbaytel Schedule Field Operations

November 02, 2018

Page 1 of 8

Schedule Number **Series Title**

TS060 **Mobility Administration Files**

To provide a record of the administration of Cellular Mobility.

MEMO:

This series includes correspondence, memos, reference material, policies and procedures, reports, forms, interview questions, training material, contract agreements and co-op advertising. Subjects include dealers, budget, credit system, marketing, software, trade show, tolls and products. These files will become superceded/obsolete when they are no longer required on a regular basis. In 2005, the department retention of this series was changed from 2 years to 1 year.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention: 1 Year
Total Retention: 5 Years

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED

Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

Archives Review

TS102 **Cable Locators**

To provide a record of cable locations.

MEMO:

This series contains information regarding locations of cables. If the cable location is underground, it is included in the work order. Under By-Law 56-2004 this schedule was the responsibility of Network Engineering & Operations. On January 1, 2009, the total retention for this series was increased from 5 years to 7 years to meet industry standards. This increase is retroactive to January 1, 2000.

Department Retention: 2 Years
Total Retention: 7 Years

Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

Archives Review

TS228 **Manager's Office Files**

To provide a record of the co-ordination and administration of the division.

MEMO:

This series includes subject files dealing with a wide range of administrative, financial, technical and personnel matters. Also includes cost jobs and projects pertaining to plant damage.

Department Retention: 2 Years
Total Retention: 7 Years

Final Disposition: Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

Archives Review



Tbaytel Schedule Field Operations

November 02, 2018

Page 2 of 8

Schedule Number	Series Title
-----------------	--------------

TS231 Administration Files

To maintain a record on specific Customer Service issues.

MEMO:

This series includes, alarm jacks, facilities requests, cord repair orders, directory assistance charges, hard of hearing, installation charges, party lines, special needs, upgrades. Under By-Law 14-2003 the retention for this series was 2 years in the department with a total retention of 5 years. Prior to August 2003, these records were used in the former Customer Services Division.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention:	1 Month
Total Retention:	2 Years
Final Disposition:	Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS232 Service Orders

To maintain a record of service provided to subscribers.

Series Closed: 12-31-1997

MEMO:

This series includes TB 497, date issued, date due, order number, telephone number, details of service requested, central office completion date, installation completion date, installer's initials.

Department Retention:	2 Years
Total Retention:	7 Years
Final Disposition:	Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS240 Dunning Reports

To provide a record of subscribers who have been given arrears notices and/or treated through the arrears process.

MEMO:

This series includes reports which include accounts that receive an arrears notice, the auto dunning call out summary, all phase 2 reports (cancellation orders/monitor reports/small balance reports/suspension reports and nophase 1 reports) and phase 3 cancellation notice reports. Any correspondence between customers and account managers for accounts that are included in the above reports. In 2010, the title for this series was changed to Dunning Reports from Denial Date Treatment Reports. Under the 2014 By-Law, this schedule was transferred over to Customer Care under the Field Operations Division from Finance Division.

Department Retention:	1 Year
Total Retention:	5 Years
Final Disposition:	Destruction

FOI Designation: PIB - PERSONAL INFORMATION BANK



Tbaytel Schedule Field Operations

November 02, 2018

Page 3 of 8

Schedule Number **Series Title**

TS243 **Consumer Care - Customer Correspondence**

To provide a record of customer correspondence.

MEMO:
This series includes address changes, changes in service, bill payments, references, customer referrals, complaints. This correspondence will become superceded/obsolete after two years unless there is legal action pending regarding accounts in arrears. Prior to August 2003, these records were used in the former Customer Services Division. In 2009 Consumer Care was added to the title of this series.
In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.
In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention: 2 Years
Total Retention: 7 Years

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED Final Disposition: Destruction
FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS247 **Cancelled Service Order Reports**

To provide a daily and weekly record of cancelled service orders.

Series Closed: 06-30-1995

MEMO:
This series includes reports which indicate the due date, customer name, customer telephone number, service address, service order number. In July 2009, this schedule was closed as of June 30, 1995.

Department Retention: 1 Year
Total Retention: 2 Years
Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS250.01 **Consumer Care - Applications for Service**

To serve as a record of subscribers' applications for mobility and land line service.

This series includes subscriber's name, address, I.D., occupation, previous telephone service (if applicable), personal reference, amount of deposit, date of application, applicant's signature and the account number. Prior to August 2003, these records were used in the former Customer Services Division. In 2009 Consumer Care was added to the title of this series.
In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.
In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations, and the department retention was reduced from 1 year to 1 month. Under the 2014 By-Law, the total retention was changed from 20 years to 7 years.

Department Retention: 1 Month
Total Retention: 7 Years

Retention Condition: AFEXP - AFTER EXPIRY Final Disposition: Destruction
FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED



Tbaytel Schedule Field Operations

November 02, 2018

Page 4 of 8

Schedule Number	Series Title
-----------------	--------------

TS250.02 Consumer Care - Applications for Service (Contracts) - Computerized

To serve as a record of subscribers' applications for service.

COPIES: Computer System

MEMO:

This series includes subscriber's name, address, I.D., occupation, previous telephone service (if applicable), personal reference, amount of deposit, date of application, applicant's signature and the account number. This information is entered into a computer system. Prior to August 2003, these records were used in the former Customer Services Division. In 2009 Consumer Care was added to the title of this series.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention: 6 Years
Total Retention: 25 Years
Final Disposition: Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS251 Consumer Care - Directory Files

To provide a record of the production of the annual telephone directory.

MEMO:

This series includes directory advertising memos, white pages listing requests and blanket orders. Prior to August 2003, these records were used in the former Customer Services Division. In 2009 Consumer Care was added to the title of this series.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention: 1 Year
Total Retention: 2 Years
Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS274 Timesheets

To ascertain number of hours worked; to provide details of types of work undertaken.

MEMO:

This series includes four categories of timesheets, i.e. installation, line, cable, and security.

This schedule was closed on February 2, 2009 and amalgamated into TS054.

On January 1, 2011, and under the 2012 By-Law this schedule was reactivated. These files are copies of time sheets kept in TBayTel Human Resources.

Department Retention: 1 Year
Total Retention: 2 Years
Final Disposition: Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED



Tbaytel Schedule Field Operations

November 02, 2018

Page 5 of 8

Schedule Number **Series Title**

TS275 **Trouble Tickets**

To document the handling of repair work orders.

Series Closed: 01-01-2000

MEMO:

ON SITE DESTRUCTION PERMITTED IN ACCORDANCE WITH RM PROCEDURE

This series consists of the trouble ticket (repair work order) which indicates the telephone number of the customer, the class of service, the customer's name and address, details regarding the equipment in question, information concerning the trouble reported or tested, information regarding the trouble found and work done, information regarding inspections carried out, employee's signature and the date. This information is maintained electronically at the Repair Service Bureau. In July 2009, this schedule was closed as of January 1, 2000.

Department Retention:	4 Years
Total Retention:	4 Years
Final Disposition:	Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS276 **Work Order Completion Forms**

To document the completion of work orders.

Series Closed: 12-31-2015

COPIES: Marketing & Sales

MEMO:

ON SITE DESTRUCTION PERMITTED IN ACCORDANCE WITH RM PROCEDURE

This series consists of the work order completion forms which indicate the location of the work undertaken, the location code, the project number, the in service date, the completion date, remarks, the name of the employee carrying out the work and the supervisor's signature. These forms are faxed to the Marketing & Sales Division. Under the 2014 By-Law, the total retention was changed from 1 year to 2 years.

This series was closed under the 2016 By-Law.

Department Retention:	1 Year
Total Retention:	2 Years
Final Disposition:	Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS279 **Residential and Business Files**

To maintain a record of the provision of telephone service to businesses.

MEMO:

This series consists of all work orders for both business and residential security, floor plans, equipment inventory listings, programming records, and memoranda. These files will become superseded/obsolete after the equipment has been taken out of service. On January 1, 2010 TS278 Centrex and Meridian Files was merged into this schedule. Under the 2016 By-Law, total retention was changed from 1 year to 2 years, and the title was changed from "Business Files" to "Residential and Business Files."

Department Retention:	1 Year
Total Retention:	2 Years
Final Disposition:	Desruction

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED



Tbaytel Schedule Field Operations

November 02, 2018

Page 6 of 8

Schedule Number **Series Title**

TS280 **Service Orders - Installation**

To provide notification of work to be carried out; to provide record of work undertaken.

Series Closed: 09-01-2006

MEMO:

ON SITE DESTRUCTION PERMITTED IN ACCORDANCE WITH RM PROCEDURE

This series consists of two categories of records, i.e. the advance dispatch copies and the installation daily work sheets. The information from the installation daily work sheets is entered into SOMS. Under By-Law 409-2005 the department retention for this series was 3 months and the total retention was three months. This is now an electronic series. Since 2003, this information has been retained in the Access Care database. In July 2009, this schedule was closed as of September 1, 2006.

Department Retention: 1 Year

Total Retention: 1 Year

Final Disposition: Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS281 **Repair Service Orders**

To update Access Care repair system.

Series Closed: 01-01-1999

COPIES: SOMS System

MEMO:

ON SITE DESTRUCTION PERMITTED IN ACCORDANCE WITH RM PROCEDURE

This series consists of service orders which indicate the order date, due date, assignment date, the order number, the customer's name, address and telephone number, facility information and Usec information. In July 2009, this schedule was closed as of January 1, 1999.

Department Retention: 4 Years

Total Retention: 4 Years

Final Disposition: Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS282 **Assignment Service Orders**

To update assignment records of cable repairs.

Series Closed: 01-01-1999

COPIES: SOMS System

MEMO:

ON SITE DESTRUCTION PERMITTED IN ACCORDANCE WITH RM PROCEDURE

This series consists of assignment service orders which indicate the order date, due date, assignment date, the order number, the customer's name, address and telephone number, facility information and Usec information. Under By-Law 19-2002 the retention period for this series was 1 month in the department, the total retention period was 1 month and the final disposition was destroy. In July 2009, this schedule was closed as of January 1, 1999.

Department Retention: 6 Months

Total Retention: 6 Months

Final Disposition: Destruction

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED



Tbaytel Schedule Field Operations

November 02, 2018

Page 7 of 8

Schedule Number	Series Title
-----------------	--------------

TS301 Consumer Care - DSL Waiver Forms and Toll Free Request Forms

To document the account holders acceptance of the terms and conditions of the internet service agreement, and long distance phone agreement.

Prior to August 2003, these records were used in the former Customer Services Division. On January 1, 2009 Toll Free Request forms were added to this series and the title of this series was changed from DSL Waiver Forms to Consumer Care - DSL Waiver Forms and Toll Free Request Forms.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention:	1 Year
Total Retention:	7 Years
Final Disposition:	Destruction

FOI Designation: A - FULLY ACCESSIBLE

TS302 Consumer Care - Customer Files - Cellular (Paper)

To maintain a record of cellular contracts.

This series includes requests for service and agreements for service. Information collected includes phone numbers, address, birthdate, social insurance number, credit card info, employment info, etc. Users: Mobility Supervisor, Mobility Representatives, Manager's Secretary. Individuals in Bank: Cellular Customers, Official Responsible: Mobility Supervisor. Under By-Law 409-2005, the department retention for this series was 2 years. The paper record will become superceded/obsolete after it has been scanned. Previously, in the 2006 By-Law, the department retention for this series was 6 months and the total retention was 7 years. In 2009 Consumer Care was added to the title of this series and the total retention of this series was increased from 1 year to 3 years due to changes in contract duration.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention:	3 Months
Total Retention:	3 Years

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED

Final Disposition: Destruction

FOI Designation: PIB - PERSONAL INFORMATION BANK

TS302.01 Consumer Care - Customer Files - Cellular (Electronic)

To maintain a record of cellular contracts

This series includes requests for service and agreements for service. Information collected includes phone numbers, address, birthdate, social insurance number, credit card info, employment info, etc.

Users: Mobility Supervisor, Mobility Representatives, Manager's Secretary

Individuals in Bank: Cellular Customers

Official Responsible: Mobility Supervisor

The scanned version of these records will be retained on C.D.'s in the office. In 2009 Consumer Care was added to the title of this series.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets.

In 2011 and under the 2012 By-Law this schedule was transferred from Strategy and Customer Solutions to Field Operations.

Department Retention:	75 Years
Total Retention:	75 Years

Final Disposition: Destruction

FOI Designation: PIB - PERSONAL INFORMATION BANK



Tbaytel Schedule Field Operations

November 02, 2018

Page 8 of 8

Schedule Number **Series Title**

TS347 **Installation & Repair - Repair Visit Forms**

To provide a record of repair visits.

This series includes 0508 completed forms.

Under the 2016 By-Law the title was changed from "Repair Visit Forms" to "Installation & Repair - Repair Visit Forms."

Department Retention: 1 Year
Total Retention: 1 Year
Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS364 **Field Operations Maintenance Logs (FOML)**

To document maintenance by Field Operations staff.

This series includes: Field Operations Maintenance Logs (FOML) issued to and completed by the Line Department, Cable Department, Installation Department, Berry Your Cable, Staals Irrigation, GridLink, On Demand Contractors and other contractors. Will also include maps forwarded by Berry Your Cable and Staals upon completion of FOML, working sheets, RSB field tickets, reports and associated correspondence.

Department Retention: 1 Year
Total Retention: 2 Years
Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS367 **Job Site Safety Forms**

To serve as a record of all completed job site safety forms.

This series includes tailboard conference forms, job risk assessment checklists, Field Operations/Observance/Notice Forms, confined space and manhole forms/repairs, pole hazard reporting forms.

Department Retention: 2 Years
Total Retention: 7 Years
Final Disposition: Destruction, Subject to F

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED
