



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 1 of 7

Schedule Number **Series Title**

TS038 **Vice President - Sales, Marketing & Communication - Administration Files**

To provide a record of the administration of the strategy and customer solutions division.

MEMO:

This series includes records related to personnel administration, corporate policies, forms, personnel files, advertising, promotion, mobility, customer engineering, service advisors, internet, regulatory issues, budget and billing systems. Records include correspondence, memos, policies, reference material, catalogues, price lists, proposals, e-mail, minutes, reports, original dealer agreements, service advisor weekly reports, notes, budget manuals, budget statements, proposals and DMT Minutes. These files will become superceded/obsolete when they are no longer required on a regular basis. On January 1, 2009 the final disposition of this series was changed from Destruction Subject to Review to Permanent Subject to Review. In 2009 the title for this series was changed from Marketing and Sales Manager's Administration Files to Vice President - Strategy and Customer Solutions - Administration Files. In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. Under the 2014 By-Law the department retention for this series was changed from 2 years to 6 months. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication". Under the 2017 By-Law, series title changed from "Vice President - Strategy and Customer Solutions - Administration Files" to "Vice President - Sales, Marketing & Communication - Administration Files".

Department Retention:	6 Months
Total Retention:	5 Years

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

Final Disposition:	Permanent
	<i>Archives Review</i>

TS040 **Minutes and Briefs**

To provide a record of marketing division activities and performance.

Series Closed: 01-01-1998

MEMO:

This series includes minutes, reports, agendas and briefs from marketing and sales supervisors team meetings, cellular co-ordinating committee, Mobility Canada and DMT meetings. In 2009 this schedule was closed as of January 1, 1998. The Strategy and Customer Solutions Division of TBayTel can not account for records from January 1, 1989 to December 31, 1993.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Department Retention:	2 Years
Total Retention:	5 Years

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

Final Disposition:	Permanent
	<i>Archives Review</i>



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 2 of 7

Schedule Number **Series Title**

TS041 **Consumer Marketing - Sponsorship Agreements - Marketing**

To provide a record of sponsor agreements.

MEMO:

This series includes original sponsorship agreements and correspondence regarding requests for cash and/or merchandise. Under By-Law 14-2003, the retention period for this series was 2 years in the department, the total retention was 2 years, the final disposition was permanent subject to review and the title for this series was Sponsorship Agreements.

Prior to February 1, 2007, this series was under the former Business Development Division. In 2009 the title for this series was changed from Sponsorship Agreements - Marketing to Consumer Marketing - Sponsorship Agreements - Marketing.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Department Retention:	1 Year
Total Retention:	20 Years
Final Disposition:	Permanent

FOI Designation: A - FULLY ACCESSIBLE

TS043 **Sales, Marketing & Communication - Manager's Office Files**

To provide a record of the administration of entire documentation from all Managers that fall under the Strategy and Customer Solutions umbrella.

MEMO:

This series includes product information, correspondence, statistics, budgets, specifications, sales reports, trunk usage reports, policies, reference material and bills. Subjects include personnel administration, procedures, traffic, vacation, travel arrangements, safety equipment, procurement, CRTC, billing agreements, service agreements, direct dialing and cellular. These files will become superceded/obsolete when they are no longer required on a regular basis. In 2009 the title for this series was changed from Business Sales Supervisor's Office Files to Strategy and Customer Solutions Manager's Office Files, the total retention of this series was increased from 5 years to 7 years and TS229 Division Administration Files as of January 1, 2001, TS230 Supervisor's Office Files as of January 1, 2005, and TS277 Employee Files as of January 1, 1995 were added to this schedule.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. Under the 2014 By-Law the department retention for this series was changed from 2 years to 6 months. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication". Under the 2017 By-Law, series title changed from "Strategy and Customer Solutions Manager's Office Files" to Sales, Marketing & Communication - Manager's Office Files"

Department Retention:	6 Months
Total Retention:	7 Years

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED

Final Disposition: Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

Archives Review



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 3 of 7

Schedule Number **Series Title**

TS045 **Enterprise Solutions - Customer Files Customer Purchased Equip. Business**

To provide a record for service requests on customer purchased equipment.

Series Closed: 12-31-2015

MEMO:

This series includes marketing memoranda, correspondence, work sheets, price quotations, maintenance agreements, work orders, work order completion forms, maintenance contracts, working papers and purchase orders. These files will become superceded/obsolete when they are no longer required on a regular basis. Under By-Law 14-2003, the retention period for this series was 1 year in the department, the total retention was 5 years, the final disposition was destroy and the series title was Customer Files - Customer Purchased Equipment. Prior to 2009 the title for this series was Customer Files Customer Purchased Equip. Business. In 2009 TS044 Customer Files City of Thunder Bay Business Sales was added to this series as of January 1, 2008.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Series closed under the 2016 By-Law.

Department Retention: 2 Years
Total Retention: 7 Years

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED
FOI Designation: A - FULLY ACCESSIBLE

Final Disposition: Destruction

TS049 **Sales - Customer Files - Ontario Government**

To serve as a record of sales to Ontario Government ministries and agencies.

MEMO:

This series includes marketing memos, work orders, work order completion forms, billing memos, station reviews, work sheets, traffic studies, correspondence, price quotations and maintenance agreements. These files will become superceded/obsolete when they are no longer required on a regular basis. Under By-Law 14-2003, the retention period for this series was 2 years in the department, the total retention was 5 years, the final disposition was destroy and the series title was Customer Files - Ontario Government. In 2009 Enterprise Solutions 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 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication". Under the 2017 By-Law, series title changed from "Enterprise Solutions - Customer Files - Ont. Government - Business Sales" to "Sales - Customer Files - Ontario Government".

Department Retention: 2 Years
Total Retention: 7 Years

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED
FOI Designation: A* - SOME EXEMPTIONS APPLY

Final Disposition: Destruction



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 4 of 7

Schedule Number **Series Title**

TS059 **Consumer Marketing - Loaner Phone Tracking Reports - Marketing & Sponsorship**

To provide a record of the use of loaner cellular phones.

Series Closed: 10-27-2017

MEMO:

This series includes reports which indicate the mobile number, user, date out, date in, usage (minutes) particulars, billed and not billed. Under By-Law 14-2003, the title for this series was Loaner Phone Tracking Reports. Prior to February 1, 2007, this series was under the former Business Development Division. Prior to 2009 the title for this series was Loaner Phone Tracking Reports - Marketing. In 2009 the department retention was reduced from 1 year to 1 month.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Series was closed under the 2018 By-law.

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

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS061 **Consumer Marketing - Purchase Requisitions - Marketing**

To provide a record of cellular mobility purchases.

Series Closed: 10-27-2017

COPIES: Mat. Mgmt./Telephone Accounting

MEMO:

This series includes copies of purchase requisitions, photocopies of invoices, and purchase orders. Under By-Law 14-2003, the retention period for this series was 2 years in the department, the total retention was 2 years, the final disposition was destroy and the series title was Purchase Requisitions. In 2009 Consumer Marketing 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 the total retention of this series was increased from 5 years to 7 years to fit with the requirements for financial records. As of the 2015 By-Law the department retention for this series was changed from 1 year to 3 months. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Series was closed under the 2018 By-law.

Department Retention:	3 Months
Total Retention:	7 Years
Final Disposition:	Destruction

FOI Designation: A - FULLY ACCESSIBLE

Archives Review



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 5 of 7

Schedule Number **Series Title**

TS065 **Sales - Data Files**

To provide reference information regarding circuits carrying data.

MEMO:

This series includes correspondence, circuit layout records, marketing memos, revenue settlement forms and orders. The records contained in this series are required for circuit installation. These files will become superceded/obsolete when they are no longer required on a regular basis. This series was previously in the Marketing & Sales Division. Under By-Law 409-2005 this schedule was the responsibility of Network Engineering & Operations. In 2009 Enterprise Solutions 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 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication". Under the 2017 By-Law, series title changed from "Enterprise Solutions - Data Files" to "Sales - Data Files".

Department Retention: 1 Year
Total Retention: 1 Year

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED
FOI Designation: A* - SOME EXEMPTIONS APPLY

Final Disposition: Destruction

TS238 **Consumer Marketing - Sales Receipts**

To maintain a record of all retail sales (including fit cards).

Series Closed: 01-10-2010

MEMO:

Prior to August 2003, these records were used in the former Customer Services Division. In 2009 Consumer Marketing was added to the title of this series. In 2009 TS245 Gift Certificate Records were added to this series as of January 1, 1999. In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. As of Jan. 1, 2010 this series was closed and amalgamated into TS248 ConsumerMarketing - Retail Sales Records.

In 2011 and under the 2012 By-Law, the total retention of this series was changed from 2 years to 7 years. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Department Retention: 1 Year
Total Retention: 7 Years

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

Final Disposition: Destruction

TS248 **Consumer Marketing - Retail Sales Records**

To document retail sales.

MEMO:

This series includes retail sales deposit summary worksheets, deposit slip copies, adding machine tapes, cash transmittal sheets, journal cash sheets, debit and credit card receipts. Prior to August 2003, these records were used in the former Customer Services Division. In 2009 the department retention for this schedule was changed from 2 years to 1 year and Consumer Marketing was added to the title. In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. As of Jan. 1, 2010 TS238 Consumer Marketing - Sales Receipts was added to this schedule. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Department Retention: 1 Year
Total Retention: 7 Years

FOI Designation: A - FULLY ACCESSIBLE

Final Disposition: Destruction



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 6 of 7

Schedule Number **Series Title**

TS303 **Consumer Marketing - Commissions - All Dealers - Cellular**

To provide a record of the payment of dealer commissions.

This series includes authorities for payment and monthly billings for dealer commissions. Under By-Law 409-2005 the department retention for this series was 2 years. In 2009 Consumer Marketing was added to the title of this series. In 2009 TS305 Dealer Co-op Advertising & Commissions/Admin Files was added to this series as of December 31, 2005.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

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

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS304 **Consumer Marketing - Media Ads - Marketing**

To verify the running of advertisements.

This series includes copies of media ads and advertising contracts. Prior to February 1, 2007, this series was under the former Business Development Division. In 2009 Consumer Marketing 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 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

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

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS312 **Sales, Marketing & Communication - Director's Files**

To serve as a record of the functions undertaken by all Directors.

In 2009 the title for this series was changed from Director's Files - Business Development to Strategy and Customer Solutions - Director's Files.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. Under the 2014 By-Law, the department retention for this series was changed from 2 years to 6 months. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication". Under the 2017 By-Law, series title changed from "Strategy and Customer Solutions - Director's Files" to Sales, Marketing & Communication - Director's Files".

Department Retention:	6 Months
Total Retention:	5 Years
Final Disposition:	Permanent <i>Archives Review</i>

FOI Designation: A* - SOME EXEMPTIONS APPLY



Tbaytel Schedule

Sales, Marketing & Communication

November 02, 2018

Page 7 of 7

Schedule Number **Series Title**

TS348 **Modem Return Forms**

To document the return of modems.

This series includes forms used to document the return of modems/medical equipment for cancelled service.

In 2009 the name of the Division for this series was changed to Strategy and Customer Solutions from Business and Consumer Markets. In 2015,

Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

Department Retention:	6 Months
Total Retention:	2 Years
Final Disposition:	Destruction

FOI Designation: A* - SOME EXEMPTIONS APPLY

TS366 **Credit Card Statements**

To provide a record of credit card statements.

This series includes employee corporate credit card and purchase card statements and supporting documentation. In 2015, Division name changed from "Strategy and Customer Solutions" to "Sales, Marketing and Communication".

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

FOI Designation: FOI - A FORMAL REQUEST MUST BE SUBMITTED

TS370 **Digital TV Content & Alliances - Administration Files**

File Digital TV Content & Alliances correspondence and related materials here.

This series includes: Digital TV Content & Alliances correspondence and related materials.

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

Retention Condition: RFC - RETENTION APPLIES AFTER FILE CLOSED

FOI Designation: A* - SOME EXEMPTIONS APPLY