



Date

The following was adopted as an Administrative Policy on June 24, 2014; amended June 2015, May and July 2020 and February 2021.

Purpose

Consistency in file naming allows information to be easily identified and enables users to search and retrieve records effectively. Defined file naming and folder naming conventions create standardized meta data on the files being catalogued. This Policy sets out guidelines for naming electronic files.

Policy

1. ROLL NUMBERS

All Roll Number formats drop the 331-jurisdiction number, drop leading 0's and the decimal

1234567 or 12345678

2. ACRONYMS

Only use [commonly accepted acronyms](#). Acronyms should not include non-alphanumeric characters and should be all caps.

3. FOLDER NAMES

Folder Names are different than File Names. Folder Names can be the File Number, the Roll Number, a description such as Minutes or a Project Name such as Wastewater Treatment Plant. Folder names do not include dates other than the year in the File Number. Folder names may include a very short description.

4. FILE NAMES

File names are different than Folder Names. Each file name must include the following sections separated by a hyphen (-), no spaces.

File Number ¹-Type Description ²-V or Status ³-YYYY-MM-DD ⁴

- 1 Do not repeat the File Number if it is already in the Folder Name
 - i.e. Folder Name is DP2020-001 or 12345.123, the File Name does not need to include it as well
- 2 Type Description
 - if correspondence, include To/From, Last Name-First Name
 - consistent with Re: or subject line
 - concise
 - accurately describe the file
 - make sense to others
 - do not include commas or words such as: and, a, the
 - do not include non-alphanumeric characters
 - use commonly accepted acronyms
- 3 Version = V followed by a two-digit consecutive number (V01), Status = Draft, Final or Approved
- 4 Must include a date at the end formatted as YYYY-MM-DD separated by a hyphen (-).

5. APPLICATION, PERMIT OR PROJECT FILE NUMBER

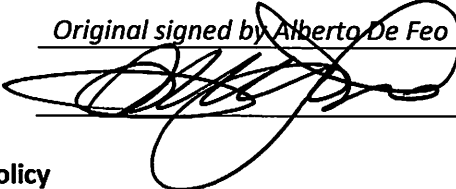
File numbers, permit numbers, RFQ, RFP and Tender numbers shall use the following format. Do not separate the File Type and the Year with a Hyphen.

File Type YYYY-000 i.e. DVP2020-005

- File type is a 1 to 5 letter acronym in ALL CAPS. Only use commonly accepted acronyms
- Four-digit year. Do not separate the File Type and Year with a space or hyphen
- Three-digit consecutive number that restarts at the beginning of each year
- A Description following the three-digit consecutive number if required. See item 4 for notes on a Description.

6. DATA STANDARDS

Standardizing the format of data is crucial for quality control. Data standards allow information to be transferred across manual and automated systems and assist with accurate search and retrieval. Ensuring all data is collected and processed using a standard format is fundamental for the organization’s information management.

Dated this 25 th day of June 2014	Alberto De Feo, CAO	<u>Original signed by Alberto De Feo</u>
Amended this 3 rd day of June, 2015	Alberto De Feo, CAO	<u>Original signed by Alberto De Feo</u>
Amended this 29 th day of May 2020	Alberto De Feo, CAO	<u>Original signed by Alberto De Feo</u>
Amended this 15 th day of July 2020	Alberto De Feo, CAO	<u>Original signed by Alberto De Feo</u>
Amended this 2 nd day of February 2021	Alberto De Feo, CAO	

I have read and understood the Records Management – File Naming Policy

Employee Name	Signature	Date
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EXAMPLES

FILE NAMES

From Parcels_Lindsay-Notice of Expropriation-2019-07-25
Records Management Strategy-2016-02-08
From Smith_John-Response to Referral-DVP2014-012-2019-09-24
Smith_Stephen-Stop Work Order-2020-04-05
Minutes-2014-11-26
WSAC-Minutes-DRAFT-2013-11-26.docx
News Release-Bear Resistant Garbage Container-2020-07-15
Okanagan Rail Trail Impact Assessment-2014-05-15
Vernon Creek Intake Dam Spill Table-2020-03-06
Public Utilities Emergency Contact Numbers-2020-02-20
To Smith_Darcy-Water Bill Due-2014-12-15.docx
Water Bill Mail Out-V01-2015-12-13.xls

ROLL NUMBER

2435908
11072113

FOLDER NAMES

A2014-001
RFP2020-003-2014-012-Visitors Information Centre
DVP2018-007
Tender-2015-001
Applications
Development Variance Permit
Minutes
Committees

[SCHEDULES A and B – Commonly accepted acronyms, active and inactive](#)

SCHEDULE A - Active

Acronym	Description
*	Ministry *only most commonly used listed
A	Access
AAC	Agricultural Advisory Committee
AAFC	Access and Age Friendly Committee
AAP	Alternative Approval Process
ACCOM	Workplace Accommodation
Add	Addendum
ADJ	Adjudication
ADMIN	Administration (when referring to department meaning shall include CS, HR, FIN, CAO)
AGMT	Agreement
ALC	Agricultural Land Commission
ALR	Agricultural Land Reserve
AP	Accounts Payable
AR	Accounts Receivable
ARC	Archived
ASP	Area Structure Plan
AT	Agri Tourism
AWP	Aerial Work Platform
BCBC	BC Building Code
BCFC	BC Fire Code
BCMSA	BC Municipal Safety Association
BEO	Byaw Enforcement Officer
BGT	Budget
BH	Bullying and Harassment
BIZ	Business Licence
BL	Blasting Permit
BLD	Building
BOV	Board of Variance
BP	Building Permit
BWN	Boil Water Notice
BYLAW	Bylaw (document adopted by Council)
CAD	Computer-Aided Dispatch
CAO	Chief Administrative Officer
CC	Community Charter
CCDC	Canadian Construction Documents Committee
CFO	Chief Financial Officer
CIB	Communities in Bloom
CIV	Civic Addresses
CMTE	Committee
COEDC	Central Okanagan Economic Development Commission
COM	Complaint
CON	Contracts
COR	Certificate of Recognition (a WorkSafe BC Program)

CORR	Correspondence
COV	Covenant (all types)
CP	Concept Plan
CREW	Crew Talk or Tailgate Meeting
CS	Corporate Services
CSA	Canadian Standards Association
CSC	Customer Service Centre
CUPE	Canadian Union of Public Employees
CWPP	Community Wildfire Protection Plan
DA	Development Application
DC	Direct Control
DCAO	Deputy CAO
DCC	Development Cost Charges
DFC	Deputy Fire Chief
Dir	Director
DLC	District of Lake Country
DNR	Drainage Permit
DMS	Document Management System
DP-C	Development Permit - Council
DP-T	Development Permit - Technical
DRA	Digital Roads Atlas
DVP	Development Variance Permit
E	Encroachment
EA	Executive Assistant
ECDEV	Economic Development
ECP	Exposure Control Plan
EDTC	Economic Development & Tourism Committee
EES	Engineering and Environmental Services Department
EIIR	Employer Incident Investigation
ELC	Election
EMBC	Emergency Management BC
ENF	Bylaw Enforcement
ENG	Engineering
EOC	Emergency Operations Centre
ERGO	Ergonomics
ESP	Enterprise Systems Plan
EX	Exemption
F	Fire
FA	First Aid
FAR	First Aid Record
FC	Fire Chief
FDM	Fire Data Management
FF	Firefighter
FFD	Fit for Duty
FI	Fire Inspection
FIA	Fire Inspection - Alarm
FIC	Fire Inspection - Correspondence

FIE	Fire Inspection - Extinguisher
FIH	Fire Inspection - Hydrant
FIK	Fire Inspection - Kitchen
FIN	Finance
FIS	Fire Inspection - Sprinkler
FLHA	Field Level Hazard Assessment
FMR	First Medical Response
FOI	Freedom of Information
FOIPPA	Freedom of Information and Protection of Privacy Act
FP	Fall Protection
FTE	Full Time Equivalent
GFOA	Government Finance Officers Association
GHS	Global Harmonized System
GIS	Geographical Information System
GR	Garbage and Recycling
GRTW	Graduated Return to Work Plan
HR	Human Resources
Hwy	Highway
IaR	I am Responding
IC	In Camera
ICS	Incident Command System
IE	In Effect
IHA	Interior Health Authority
ILMB	Integrated Land Management Bureau
INS	Insurance
INSP	Workplace Inspection
IR*	WorkSafe Inspection Record *WorkSafe
IR*	Incident Report *Fire
ISO	International Standardization Organization
ITT	Invitation to Tender
JCC	Joint Consultation Committee
JD	Job Description
JFF	Junior Fire Fighter
JOHSC	Joint Occupational Health and Safety Committee
JSA	Job Safety Analysis
JTO	Job Task Observation
KFD	Kelowna Fire Department
LA	Land Administration
LC	Lake Country
LCFD	Lake Country Fire Department
LE	Legal
LEA	Lease
LGA	Local Government Act
LGMA	Local Government Management Association
LOC	Letter of Credit
LOU	Letter of Understanding
LSA	Local Service Area

LT	Leadership Team
LTA	Land Title Act
LTI	Lost Time Injury
LTO	Land Title Office
Ltr	Letter
LTSA	Land Title and Survey Authority
LUC	Land Use Contract
MA	Medical Aid
MC	Mayor and Council
MFA	Municipal Finance Authority
Mgmt	Management
Mgr	Manager
MIA	Municipal Insurance Association of BC
MMCD	Master Municipal Construction Documents
MOE	Ministry of Environment *only most commonly used listed
MOT	MOTI Permit
MOTI	Ministry of Transportation *only most commonly used listed
MOU	Memorandum of Understanding
MR	Moorage Referrals
MTI	Municipal Ticket Information
MVA	Motor Vehicle Accident
MVI	Motor Vehicle Incident
NAOSH	National Occupational Safety and Health Week
NFPA	National Fire Protection Association
NIOSH	National Institute of Occupational Safety and Health
NM	Near Miss
NOI	Notice of Intent
NOP	Notice of Project
NOPA	Notice of Project Asbestos
NOT	Notice on Title
NQI	National Quality Institute
OBP	Open Burning Permit
OBWB	Okanagan Basin Water Board
OCP	Official Community Plan
OFAA	Occupational First Aid Attendant
OFC	Office of the Fire Commissioner
OFGC	Oceola Fish and Game Club
OHS	Occupational Health and Safety
Ok	Okanagan
OKIB	Okanagan Indian Band
ONA	Okanagan Nation Alliance
OT	Overtime
OV	Overheight/weight Vehicle
P	Project
PAAC	Public Art Advisory Commission
PAR	Parks
PARC	Parks and Recreation Advisory Committee

PAY	Payroll
PG	Paygrade
PH	Public Hearing
PIB	Penticton Indian Band
PIO	Public Information Officer
PLDEV	Planning and Development Department
PO	Purchase Order
POL	Policy
PPE	Personal Protective Equipment
PRC	Parks, Recreation and Culture
PRO	Procedure
PROSERV	Protective Services Department
PSL	Property Status Letter
PUR	Purchasing
QTR	Quarter
R	Referral
RA	Risk Assessment
RC	Road Closure
RDCO	Regional District of Central Okanagan
RDNO	Regional District of North Okanagan
Re	Regarding
REC	Recreation
RFCD	Request for Council Decision
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Quote
RMS	Records Management System
ROW	Right of Way
RPA	Regional Plan Amendment
S	Subdivision
S&DS	Subdivision and Development Servicing Bylaw
SC	Shipping Container
SCBA	Self-Contained Breathing Apparatus
SDS	Safety Data Sheet
SEW	Sewer
SOG	Standard Operating Guideline
SP	Sign Permit
SPT	Tourism Sign Permit
SR	Service Request
SRI	SRI Permit
SROW	Statutory Right of Way
SRP	Soil Removal
SUB	Supplemental Unemployment Benefit
SWP	Safe Work Procedures
TAX	Property Taxes
TCA	Traffic Calming Assessment

TCP	Traffic Control Person
Tender	Invitation to Tender
TK	Tourism Kelowna
TOLGMA	Thompson Okanagan Local Government Management Association
TUP	Temporary Use Permit
U	Utility (Permit to Construct in the ROW)
UBCM	Union of British Columbia Municipalities
UD	Utilities Department
WAT	Water
WBC	WorkSafe BC
WC	Wellness Committee
WELL	Well
WFN	Westbank First Nation
WHMIS	Workplace Hazardous Materials Information Systems
WO	Work Order
WPV	Workplace Violence
WQA	Water Quality Advisory
WS	Water and Sewer
WSAC	Water Services Advisory Committee
WWTP	Waste Water Treatment Plant
Z	Zoning

SCHEDULE B - Inactive

Acronym	Description
CCS	Community and Customer Services
DP	Development Permit
EMT	Executive Management Team
EPDC	Economic Planning and Development Committee
IFS	Infrastructure Services Department
MOC	Ministry of Culture, Sport and Community Development
OHSC	Occupational Health and Safety Committee
PEP	Provincial Emergency Program
PS	Protective Services Department
STPCO	Sustainable Transportation Partnership of the Central Okanagan
SUP	Special Use Permit
TC	Temporary Commercial
TDC	Tourism Development Commission
TI	Temporary Industrial
TP	Temporary Permit
TSP	Tourism Sign Permit
WCB	Workers Compensation Board now WorkSafeBC