



ST6800: Students – Postgraduate Medical Trainee Management		
University of British Columbia RECORDS SCHEDULE		Schedule Number: ST6800
Primary Title: Postgraduate Medical Trainee Management		Office of Primary Responsibility (OPR): Faculty of Medicine Postgraduate Medical Education
Records documenting the education of postgraduate medical trainees in residency, post-residency or post-certification programs. Includes process of admission, matched CaIRMS information, resident files, and postgraduate visiting electives and fellows. Includes resident leave, vacation management letters of award and disciplinary actions.		
Vital: No		PIB: Yes
Authority: Postgraduate medical Education Policy No. 5 Resident Records Policy		Date Approved: 20220729
Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	Policies and Procedures	EV+5Y, FR EV=when record is superseded or obsolete FR=UA will fully retain records from this series
05	General	EV+5Y, D EV=when record is superseded or obsolete
10	Admissions and Recruitment Assessments Includes Rank order Lists, interview notes and forms, file review forms, checklists, etc.	EV+1Y, D Unsuccessful = C+1Y, Destroy. Successful = Retain in resident file
12	Applications for CaRMS - Matched For CMGs, IMGs and Sub- Specialty.	EV+ 1Y, D EV= duration of residence Note: Do not download unmatched from CaRMS



20	Committees	CY+5Y, SR SR=UA will selectively retain records from this series
21	Postgraduate Fellows Records of attendance and grades are sent to home school.	AY+7Y, D
22	Postgraduate Visiting Electives	AY+7Y, D
25	Resident Files (paper and digital files) Includes application records, certificates, AVPs, CCTs, EPAs, ITERs, CITERs, OSCEs, FITER, Transfers, Waiving, Training Verifications, PEAPs, Electives, leave and vacation management records, letters of good standing, letters of award, correspondence with sites and trainees.	CY+50Y, D Individual records to be transferred to resident file once process copies are no longer active or once information is entered into an information system Note: Final summative judgement records such as FITER, remediation plans, disciplinary actions and correspondence should be retained for the full retention. Field notes and periodic reviews are less important and could be weeded from the file once the summative record exists.
31	Tracking Includes any documents used to track entities such as resident contact information, sponsors, community or teaching site information, progress, budget expenditure, etc.	EV+0, D EV=when tracking is no longer required
35	Verification of Training Includes verification letters that past residents request to verify their training, which are only retained for internal reference, and corresponding invoice. Note: A digital version of verification letters and corresponding invoices may serve as convenience copies for	CY+50Y, D



	internal reference. This information should be part of the Resident file.	
45	Issues	CY+5Y, D
60	Reports	CY+5Y, SR SR=UA will selectively retain records from this series
<p>Acronym Key. AY = Academic Year; CY=Calendar Year; D=Destroy; EV=Event; FY=Fiscal Year; FR=Full Retention by University Archives unless otherwise noted; OPR=Office or Department responsible for <i>source of truth</i> records; SO=When superseded or obsolete; SR=Selective Retention by University Archives; UA=University Archives; Y=Year</p>		