

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: RETENTION, ADMINISTRATIVE FILES, RECORDS AND DOCUMENTS**

**Applies to:** Management and Supervisors

**Effective/Revision Date:**

March 27, 2017

May 13, 2019

#### **Documents Requiring Access**

1. The following documents are scanned and/or saved to the specified server directory by the leadership staff that received them:

- Fire inspections, Building Inspections and Licensing Inspections to the Management/Risk Management/Appropriate Year Folder.
- CLBC Contracts to Management/Contracts/CLBC/Folder of the Service the contract applies to.
- CLBC Funding Guide Templates (FGT) to Management/CLBC/FGTS/Appropriate Year Folder.
- Social Ventures Contracts to Management/Employment Manager/Social Ventures/Contracts/Folder of the Contractor.

2. Additional documents that require referencing i.e. regulatory information, insurance etc., are scanned and uploaded to the appropriate directory.

3. The person uploading the documents notifies the relevant leadership team member(s) via email that the document has been uploaded and the location.

#### **Documents Required by Contracts or Federal/Provincial Regulatory Bodies to Keep**

1. Documents that expire are given to the executive director and then filed in the relevant storage deposit.

2. In the month of April, the leadership team gathers all documents that are expired or relate to the prior year's activities, places them in banker boxes and gives the boxes to the executive director.

3. They label the information and place it in the relevant storage deposit.

4. Documents that reach the required storage period are shredded.

#### **Documents Required by Policy to Keep**

1. When a policy is updated, the original is scanned and uploaded to the relevant "Year Scanned Old Policies and Procedure" file in the management directory. The original is shredded.

2. When a procedure is updated, the original is saved to the relevant "Year Old Policies and Procedure" file in the management directory. The original is shredded.
3. When a form is updated, the original is saved to the relevant "Year Old Forms" file in the management directory. The original is shredded.
4. Accreditation documents that are not required to be kept, are shredded and destroyed as per the policy.

**Other**

1. Managers and supervisors consult with the executive director to determine if a document can be scanned, uploaded and potentially disposed of.