

00.3 Records Management

Spectrum Society maintains various written records related to individuals served, personnel, and business functions. This documentation supports effective service delivery and complies with requirements set by our funders and applicable legislation and regulations.

- (a) Documentation requirements related to individuals, personnel, and Society business functions will be clearly defined, including where records will be kept and who will have access. Please refer to the Privacy Policy for guidelines on the storage and retrieval of confidential information.
 - (i) Documentation includes any written, videotaped or audiotaped record, including reports, log notes, emails, text messages and voicemail messages.
- (b) Individual records will be kept in a locked cabinet at the Society's office, on the secure Sharevision site, at the individual's home, or in secure off-site storage and will be retained for a minimum of 7 years following the end of services and will not be discarded or destroyed (even beyond 7 years) without the Executive Director's approval.
 - (i) Upon start-up of services, a Service Plan will be completed with the individual, outlining the scope of services, level of support required, individual goals, planning and decision-making processes. Within 30 days of services starting, a detailed Support Plan will be completed, describing support strategies, personal network, and individual strengths, interests, vulnerabilities and safeguards.
 - (ii) The manager is responsible for ensuring that individual records are kept up to date, including the Support Plan, record of planning meetings, record of support provided (activities, log notes) and medical / financial records as applicable.
- (c) Personnel records will be kept in a locked cabinet at the Society's office, on the secure ComVida site, or in secure off-site storage and will be retained for a minimum of 7 years following the employee's end date.
 - (i) Solicited applications for employment, including resumes and supporting documents, will be kept on file by HR for a minimum of 3 months. Unsolicited applications will be kept at the discretion of HR.
- (d) Business records will be kept in a locked cabinet at the Society's office, on the secure Sharevision site, or in secure off-site storage and will be retained according to statutory, contractual or regulatory requirements.
 - (i) Records related to the Society's Non Profit Society status, including certificate of incorporation, constitution, by-laws, record of board meetings, list of directors, membership list and audited financial statements will be kept in perpetuity.

(ii) Payroll and business records required by Canada Revenue Agency will be kept for a minimum of 7 years.