

## 8.4 RECORDS MANAGEMENT POLICY

### Purpose

As a provider of services, BACI is required by statutory<sup>1</sup> and contractual obligations to establish, maintain and dispose of records. It is also a necessary requisite of providing quality services and being accountable to the people we serve, our members, our funders and the public.

### Definition

Records may be either individual records, program or resource records or corporate records. They may include documents, books, letters, photographs or audio or video recordings. And they may be stored on different types of media, from paper to electronic formats.

### Policy

BACI will establish and maintain records for: (1) people we serve; (2) employees; (3) volunteers; (4) members; and (5) donors.

BACI will also establish and maintain the following records:

- Financial (payroll, accounts, etc.)
- Administrative (attendance, vehicle, etc.)
- Legal (contracts, minutes, etc.)

### File Status

Records may have one of the following two statuses:

- Open
- Closed

Files will be opened once a person is added to a waitlist or once service is provided. Information may be held temporarily prior to a person receiving services or being added to a waitlist. If no file is opened, the information will be destroyed. Files are Closed once BACI ceases to provide service to an individual and there remain no outstanding issues or liabilities.

### Protection of Personal Information (Confidentiality)

Files that contain personal information must comply with the BACI Privacy Policy for individuals and families and the BACI Privacy Policy for Employees.

### Responsibility

The responsibility for establishing, maintaining or destroying administrative documents and records for individuals will be defined in Records Management Procedures.

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<sup>1</sup>

Document Disposal Act, Freedom of Information and Protection of Privacy Act, Income Tax Act

**Linking Policies:**

1.8 Code of Ethics

8.1 Privacy Protection for Individuals

8.2 Privacy Policy – Plain Language

8.3 Privacy Protection for Employees