

RECORDS MANAGEMENT

HR B5

INTENT

To provide safe keeping of employees' personal information in compliance with all legal and statutory requirements

POLICY

Sunshine Coast Community Services Society shall maintain confidential personnel and payroll files on all staff. Files will be kept in a secure area and will be accessible only to designated staff. Those designated staff will sign in and out any files removed from the secure area and will take full responsibility for the confidentiality and return of that file.

PROCEDURE

The personnel and payroll file cabinets are to be locked whenever a designated staff is not present.

Personnel files for each employee may contain, but will not be limited to the following:

1. Application for employment / resume
2. Physician's statement and immunization record (where applicable).
3. Letter of appointment / acceptance with rates of pay specified
4. Written performance appraisals.
5. Records of disciplinary action.
6. Orientation checklist (where applicable).
7. Driver's abstract, copy of vehicle insurance and driver's license (where applicable).
8. Diplomas, certificates where applicable
9. Verification of qualifications and at least two telephone references
10. Signed Confidentiality Agreement
11. Emergency Contact Sheet
12. Evidence that a criminal record check was completed.
13. Other information relevant to the employee's employment except for ongoing medical information, e.g. medical leave of absence, doctor's notes.

Payroll files for each employee must contain, but will not be limited to:

1. Completed Employment Form
2. Tax/Municipal Pension Plan/benefit forms
3. Changes in employment information
4. Timesheets
5. Record of payments and deductions for each pay period.
6. Ongoing medical information, e.g. medical leave of absence, doctor's notes.

Staff may have access to the information in their file, exclusive of staff reference checks, with two days written notice directed to the Executive Assistant. The file shall be viewed in the place where it is normally kept and in the presence of a designated staff. At that time, copies of file entries will be provided if requested. All staff information will be held as confidential and will be given out only with the staff's written authorization, and where applicable will follow the procedure detailed in the collective agreement.

The following conditions are exceptions to the requirement for prior written authorization by the staff:

- Technical information to the Union for bargaining purposes.
- The provision of information essential to the operation of the Society's business.
- Statutory requests

Staff information shall be held for a minimum of two (2) years after termination of employment or for the time period dictated by legislation, whichever is greatest. During this period, only designated staff will have access to those records. Upon expiry of the designated period, any disposal of staff records shall be done in a manner that ensures confidentiality (e.g. incineration or shredding).

EFFECTIVE: December 1, 2015	APPROVED BY: Executive Director	
REPLACES: April 1, 2014	MONITORING: Executive Director	FREQUENCY: Annually