WRHA VOLUNTEER SERVICES
GOOD PRACTICE GUIDELINE MANUAL

Good Practice Guideline:	Reference # 8.1	Page 1 of 4
Records Management	Approved:	Date: September 2, 2015

GOOD PRACTICE DESIRED OUTCOME:
WRHA Volunteer Services will maintain accurate and useful volunteer files for all volunteers. All volunteer files reside within the WRHA Volunteer Services Department and must be stored in a secure and confidential manner in accordance with privacy legislation.

Ensure all WRHA Volunteers' files (hard copy and electronic) will be retained and destroyed accordingly based on legal practise and privacy legislation.

DEFINITIONS:
 Hard Copy Volunteer File is a volunteer's paper file that may include, but not limited to:
- Application form
- Assignment descriptions or placement documentation
- Personal information and resumes
- Interview notes
- Documentation of screening procedures
- Signed confidentiality agreements and waivers
- Records of participation in orientation and training sessions
- Emergency contact information
- Records of recognition or awards
- Supervision notes or formal review documentation
- Change of status or assignments
- Attendance records and timesheets
- Letters of reference or recommendation
- Records of corrective action

Good Practice Guideline:	Reference # 8.1	Page 2 of 4
Records Management	Approved:	Date: September 2, 2015

Electronic File is a volunteer's file that is kept on an Information Management Database program.

Inactive File is a volunteer's file who originally was an active volunteer but is no longer volunteering.

Not Placed Files are files of potential volunteers which did not make the interview stage as well as those that were interviewed and where not placed for whatever reason.

Volunteer Profile is the report that is printed from the information management database program when a volunteer becomes Inactive and/or Not Placed. This report provides a summary of the volunteer's involvement.

Information Management Database program is a trusted and secure electronic computer system that is used to store and coordinate volunteer information and placements.

Secured Place means a physical environment for the temporary or permanent storage of, or for the use, processing or transmittal of personal information that has the following characteristics:
• not readily accessible by unauthorized users;
• supervised or monitored by authorized users;
• keyed to allow entrance to authorized users only;
• locked when authorized users are not in attendance;
• protected by controls to minimize loss, destruction or deterioration caused by fire, water, or humidity damage; and
• proper containers and adequate labeling are used to reduce accidental loss or destruction.

WRHA VOLUNTEER SERVICES
GOOD PRACTICE GUIDELINE MANUAL

Good Practice Guideline:	Reference # 8.1	Page 3 of 4
Records Management	Approved:	Date: September 2, 2015

GOOD PRACTICE GUIDELINES:

1. Access to all hard copy and electronic volunteer files is limited to the staff within the Volunteer Services Department. All requests for information about a volunteer must be made through the Manager of Volunteer Services, who will consider files as confidential.

2. The Volunteer Placement Supervisor may have access to basic personal information and must maintain the confidentiality of the information in accordance with privacy legislation.

3. Upon reasonable notice, and while accompanied by the Manager of Volunteer Services, a volunteer may have access to their hard copy and/or electronic volunteer file, with the exception of third party information. Volunteers may make copies of parts of their volunteer file that they are entitled to have access to. Documents may not be removed from the file.

4. Retention of Inactive Files:
   In accordance with legal and administrative requirements, inactive files should be kept for a minimum of seven (7) years from date of inactivity. It is recognized that in some cases, some volunteer files may be kept for longer periods of time.

   Upon a volunteer's date of inactivity, print the Inactive Volunteer Profile report. This report will be attached to the front of the volunteer's hard file and filed alphabetically by last name. This now consists of the volunteers hard copy file and is retained for seven (7) years.
   The electronic file is kept on the Information Management Database program as an Inactive record for two (2) years based on the end of the fiscal year as it allows for comparison purposes.

   After two (2) years, the record may be deleted from the Information Management Database program or if space allows move to Archived Status within the information management database system for an additional fiscal year. After this the volunteer's electronic file can be deleted from the system.

   The hard copy file is destroyed by confidential waste after the seven (7) year time frame period.

WRHA VOLUNTEER SERVICES
GOOD PRACTICE GUIDELINE MANUAL

Good Practice Guideline:	Reference # 8.1	Page 4 of 4
Records Management	Approved:	Date: September 2, 2015

5. <u>Retention of Not Placed Files:</u>
    The hard copy of Not Placed files will be kept for one year from date of application.

    The Not Placed electronic file on the information management database program will be deleted from the database at the end of each fiscal year once the year end reports have been generated.

    Prior to the electronic file being deleted from the information management database program, the Not Placed Volunteer Profile report is printed and attached to the front of the hard copy file. They are filed by the month the application was received within the year. These binders are secured within the Volunteer Services Department. At the end of each month, the preceding month of applications will be destroyed through confidential waste.

    Any Not Placed files that are considered "red flag" may be retained longer.