

Records Management Policy

Goal: To move from paper records to electronic records for the Permanent Record Form (PRF).

This will allow the Forms to be filled out and updated electronically, to be kept in a local computer folder and then sent electronically to a Provincial folder set up for that Community. It eliminates the need to mail paper copies to the Province, and it also enables the Central Office Administrator (COA) to search the records electronically. It also provides a backup copy of local Community records. Should these be lost, they can be restored from the Provincial Records Management folders.

Once the electronic copies of the Permanent Record Form are created, then it will be possible to create both a local Community Directory and a Province-wide Directory automatically using a Microsoft Word procedure provided by the COA. [It is not policy that the local Community must use this method to create its Community Directory.]

The Province will also be able to inform Communities whether an individual attempting to become a member of its local Community is eligible/ineligible based on the past action of another OCDS Council, for instance, if they have been previously dismissed from the OCDS.

1. These electronic forms replace all paper forms previously used in the Province:
 - The individual's Permanent Record Form (PRF)
 - The Transfer and Acceptance Form (to be used whenever a person transfers into the Community)
 - A Guest Form (use of this form is not required by Provincial Policy)
2. Roles and Responsibilities
 - a. Local Council
 - Establish the role of Records Manager in your Community and appoint someone to this task.
 - Establish your own Records Management Policy that provides further guidance on how you want the forms to be filled out, etc.
 - Make sure your local records policy and that of the Province is followed.
 - b. Individual Member
 - Fill out your Permanent Record Form (PRF) according to Provincial and local requirements.
 - Update your record form whenever there is a change, especially to your status, phone, or address, and provide this to the local Records Manager.

c. Records Manager

- Follow the process provided by the Provincial Council for the Records Manager. Follow any additional requirements found in your local Records Management policy.
- Review the individual Permanent Record Forms to make sure they are accurate, especially the Formation Level and status field of the individual. Make sure the form is saved with the individual's name (lastname_firstname.docx) into your OCDSRecords folder on your computer Desktop.
- If a person leaves the Community, fill out Sections V and VI of their Individual Permanent Record Form and update the Status Field and Current Date.
- Upload the Permanent Record Forms to the Provincial cloud storage area when there are Status changes, at the end of the calendar year, and as requested by the COA or your local records management policy.