

Girl Guides of Canada-Guides du Canada  
New Brunswick Council

## Instruction for Records Retention

New guidelines from our national office will help better protect the personal information of girl and adult members. Most forms that are completed by members in your units, districts and areas must be sent to the provincial office, where trained and screened staff members will manage them in accordance with provincial and federal privacy legislation.

These instructions will prove to be useful for Guiders at every level. Note: For the purposes of records retention, Independent Group Trips will be handled as a “unit”.

Completing paperwork is already a part of being a Guider, so this process of organizing and transferring must be thought as an extension of the duty of a responsible Guider. You will need 8.5”x11” envelopes to file and transfer forms in (reuse of envelopes very much appreciated if they are still in good condition). There are three (3) labels available (from your Commissioner or from the New Brunswick Council website at <http://www.girlguides.nb.ca> which you will print off, affix to the envelope with tape and use to track what documents are inside. Please use one envelope for each unit event/activity or purpose.

**Why is this necessary?** In order to comply with privacy legislation and to protect the privacy and safety of our girl and adult members, New Brunswick Council has decided that the safest place for personal information is in the secured Records Retention area of Guide House (the provincial office). The envelopes will not be opened by anyone who has not undergone the same screening as you did to become a Guider. The confidentiality of the forms will continue to be protected by staff and volunteers alike.

### How to complete for non-financial documents

1. Based on the date of the event/activity, select and print the appropriate Forms Retention Envelope Label – for use prior to SafeGuide 2008 or for use with SafeGuide 2008.
2. **Fill in** your name, your unit’s iMIS number and the date of the event/activity that the forms inside relate to on a printout of the downloadable label entitled “Forms Retention Envelope Label”
3. **Write a brief description** of the event or purpose. This should be something simple but descriptive like “Camp 2008”.
4. **Indicate** what forms are included in the envelope beside the appropriate form number/name. Insert forms (should be the originals, not copies) in the envelope that are indicated on the label. If you question whether the form type should be included or not, include all forms of that type and indicate on the label under “Other”.
5. **Affix the label to the envelope using tape and seal the envelope.**

**Keep the envelopes safe** by keeping them in the safest possible place in your home. They should be kept in an area in which they are at the least risk of being accessed by others or accidentally thrown away. A cookie box works well as a filing box, somewhere off the floor, in case of flooding.

**As frequently as possible**, submit the sealed envelopes to Guide House c/o the iMIS Administrator, for filing in the secured Record Retention area.

**Do not keep copies of the forms.** The reason for transferring the forms to the secured storage area at Guide House is so that the personal information on them will be kept safe and secure. This effort is wasted if there are multiple copies retained by Guiders.

**If you have electronic copies of forms** such as Word documents or PDF's, these must be deleted from your hard drive as soon as you are finished printing paper copies. It is unacceptable to keep personal information in completed forms on your computer to use as examples in the future because the private information on them will not be protected. You may save completed forms as a "template" for future use, but without any personal information. After you have deleted them, remember to empty your computer's recycle bin.

**ALL registration documents are to be forwarded DIRECTLY to the provincial iMIS Office within thirty (30) days of the date received from parent/guardian (for girl/youth member registration forms) and immediately upon completion for screening and adult member forms.** The documents submitted to the iMIS Office should be the originals, not copies.

### **How to complete for Financial documents**

1. **Fill in** your name, your unit's iMIS number and the reporting period to which the forms inside relate to on a printout of the downloadable label entitled "FINANCIAL Forms Retention Envelope Label"
2. **Indicate** what forms are included in the envelope beside the appropriate form number/name.
3. **Affix the label to the envelope using tape. DO NOT seal the envelope.**
4. Submit your financial records to the reviewer approved by your parent council.
5. Upon completion of the review, the reviewer will discuss any questions, concerns or suggestions to the financial record keeping Guider and return items required for ongoing financial management of the unit, district or area (e.g. cheque book, deposit book, etc.). A report will be presented to the parent council, and the individual envelopes will be sealed and presented to the commissioner for transfer to Guide House for filing in the secured Records Retention area.