

PATHWAYS ABILITIES SOCIETY

PROCEDURE: EMPLOYEE, VOLUNTEER AND TENANT FILES AND INFORMATION

Applies to: All Personnel, Volunteers and Tenants

Original Effective Date: April 28, 2003

Effective Date: December 21, 2023

Replaces Procedure Dated: July 10, 2023

Bargaining Unit and Management Personnel

1. The executive director collects all relevant personnel file information at the initial orientations and in the month of January.

2. The people and culture manager or designate:

- Identifies outstanding or expired information, documents and provides the supervisors and managers or designate with a copy.

- Is responsible for keeping personnel files and employee ShareVision lists current and up to date. Information that is expired or updated is destroyed as outlined in the Pathways Abilities Society Confidentiality and Release of Personal Information policy and procedures.

- Audits and updates active bargaining unit and management personnel files annually in the month of January.

- When a person leaves employment, consolidates their files, and gives it to the executive director to be stored for the required retention period.

3. The supervisors and managers or designate are responsible for obtaining the outstanding information and provide it to the executive director or designate in the format outlined in the current Employee, Volunteer and Tenant Files and Information format. They verify the original documents when applicable.

4. Employees are responsible for notifying the people and culture manager or executive director of changes relating to the maintenance of their personnel file, ShareVision list and required certifications.

5. An employee and volunteer wishing to review their file content contacts the people and culture manager or designate or the executive director to arrange a mutually convenient time.

Social Ventures Personnel

1. The employment manager or designate:

- Collects all relevant social ventures personnel file information at orientations and in the month of November.

- Identifies outstanding information and obtains. They verify the original documents when applicable.

- Is responsible for keeping social ventures personnel files and employee ShareVision lists current and up to date. Information that is expired or updated will be destroyed as outlined in the Pathways Abilities Society Confidentiality and Release of Personal Information

policy and procedures.

- Audits and updates personnel files annually in the month of November.
- When the person leaves employment, condenses the file and gives it to the executive director to be stored for the required retention period.

2. Employees are responsible for notifying the employment manager or designate of changes relating to the maintenance of their personnel ShareVision list and required certifications.

3. An employee wishing to review their file content contacts the employment manager or designate to arrange a mutually convenient time.

Volunteers

1. The employment manager and executive director or their designate:

- Collects all relevant volunteer file information at orientations and in the month of March.
- Identifies outstanding information and obtains. They verify the original documents when applicable.
- Is responsible for keeping volunteer files and volunteer ShareVision lists current and up to date. Information that is expired or updated will be destroyed as outlined in the Pathways Abilities Society Confidentiality and Release of Personal Information policy and procedures.
- Updates active files annually in the month of March.
- When the person leaves employment, condenses the file and gives it to the executive director to be stored for the required retention period.

2. Volunteers are responsible for notifying the employment manager or executive director or designate of changes relating to the maintenance of their file and ShareVision list and required certifications.

3. A volunteer wishing to review their file content contacts the employment manager or executive director or designate to arrange a mutually convenient time.

Tenants

1. The building manager:

- Collects all relevant tenant file information prior to occupancy.
- Is responsible for obtaining the outstanding information in the format outlined in the current Personnel, Volunteer and Tenant Files and Information format.
- Is responsible for keeping tenant files current and up to date. Information that is expired or updated will be destroyed as outlined in the Pathways Abilities Society Confidentiality and Release of Personal Information policy and procedures.
- When the person moves condenses the file and gives it to the executive director to be stored for the required retention period.

2. Tenants are responsible for notifying the building manager or designate of changes relating to the maintenance of their tenant file.

3. A tenant wishing to review their file content contacts the building manager to arrange a mutually convenient time.