

PATHWAYS ABILITIES SOCIETY

POLICY: PERSONS SERVED FILES AND RECORD OF EFFECTS

Applies to: All Personnel, Volunteers, Persons Served, Families, Advocates and Caregivers

Original Approval Date: 1993

Date Board Approved: October 18, 2021

Replaces Policy Dated: January 20, 2020

Board Member's Signature

Every person Pathways Abilities Society provides service to has their own personal binder. The purpose of the binder is to keep copies of original documents and written correspondence that otherwise cannot be kept on ShareVision our main computerized data collection source.

Information that is outdated is scanned and uploaded to the person's file on the computer server. Once completed unless as specified below, the information is shredded.

When a person exits service, the content of the binder is uploaded to their file on the computer server and current signed paper copies of documents are retained for a 10 year period.

Each person is entitled to review the information contained in their own personal binder and on their ShareVision website. Individual's binders cannot be taken offsite without prior written approval as outlined in Pathways Abilities Society policy.

The following tables identify the order of the content and section titles for each binder in the specific service area. The tables also outline how long the information must be kept (retention period) in the appropriate section or file unless it is returned to the contracting body as outlined in contracts or policy. After the specified retention period, 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.

Within the various sections of each binder the following information will be contained: The person's: name, address, telephone number, date of birth, *social insurance number, sex, height, weight, eye color, medical number, *immunization and TB screening, service start date, address and telephone number of an emergency contact, next of kin, medical and *dental practitioner, *government worker(s), and health and disability information. The information with an asterisk* beside it is voluntary. Sections that are not relevant will have a "Not Applicable" page inserted.

The Consent and Community Support form and protocols are completed when a person starts service, updated as required and new forms completed annually unless otherwise specified on the document(s).

Individuals, their family and/or caregivers are responsible for notifying Pathways Abilities Society if there is a change in the person's information.

All Service Areas except the Homes and Home Share:

Order of information, BOLDED is tab section title	Binder "Original" Section Retention Period
Individual Information	
Picture	Life of Binder, update periodically
Individual Information Sheet	Most current, updated annually
ISP Plans and Contracts	Most current, previous are kept on ShareVision
Community Support and Consent/Designated Decision Maker Information	<ul style="list-style-type: none"> - Most current Community Support and Consent form, previous are uploaded to the individual's file on the computer server - Most current documentation regarding designated decision makers, Representation agreement, legal guardianship, previous are uploaded to the individual's file on the computer server
Employment & Volunteerism	
Employment Services Participation Agreement	Most current, previous are uploaded the individual's file on the computer server
Resume	Most current, previous are uploaded to the individual's file on the computer server
Protocols and Support Plans	Most current, previous are uploaded to the individual's file on the computer server
Medication and Health Information (MAR Sheets, Health Care Plans, Drug Disposal Forms, etc.)	1 calendar year of the most current, previous are uploaded to the individual's file on the computer server annually
Intake	
Referral	Life of the Binder
Applications	Original and the most current, the Life of the Binder
Discovery	Life of the Binder
Completed Person Receiving Service Orientation Checklist	Life of the Binder
Miscellaneous Forms and Correspondence	3 years, previous relevant documents are uploaded to the individual's file on the computer server

Homes (licensed facility):

Order of information, BOLDED is tab section title	Binder “Original” Section Retention Period
Pouch containing identification (medical card, passport, birth certificate, etc.)	
Individual Information	
Picture	Life of the Binder, update periodically
Individual Information Sheet	Most current, updated annually
ISP Plans, Care Plans, Contracts and Daily Routines	Most current, previous are kept on ShareVision
Community Support and Consent/Designated Decision Maker Information	<ul style="list-style-type: none"> - Most current Community Support and Consent form, previous are uploaded to the individual’s file on the computer server - Most current documentation regarding designated decision makers, Representation agreement, legal guardianship, previous are uploaded to the individual’s file on the computer server
Protocols and Support Plans	Most current, previous are uploaded to the individual’s file on the computer server
Medication and Health Information (MAR Sheets, Health Care Plans, Drug Disposal Forms, Consent for Transport, etc.)	1 calendar year of the most current, previous are uploaded to the individual’s file on the computer server annually
Medical Visit Reports	1 year is maintained in the binder, all forms are uploaded to the individual’s file on the computer server
Intake	
Applications	Original and the most current, the Life of the Binder
Completed Person Receiving Service Orientation Checklist	Life of the Binder
Miscellaneous Forms and Correspondence	3 years, previous relevant documents are uploaded to the individual’s file on the computer server

Home Share:

Order of information, BOLDED is tab section title	Binder “Original” Section Retention Period
Individual Information	
Picture	Life of the Binder, update periodically
Individual Information Sheet	Most current, updated annually

Plans (ISP, Care Plan, Contracts, etc.)	Most current, previous are uploaded to the individual's file on the computer server
Community Support and Consent/Designated Decision Maker Information	- Most current Community Support and Consent form, previous are uploaded to the individual's file on the computer server - Most current documentation regarding designated decision makers, Representation agreement, legal guardianship, previous are uploaded to the individual's file on the computer server
Protocols and Support Plans	Most current, previous are uploaded to the individual's file on the computer server
Health Miscellaneous	3 years, previous are uploaded to the individual's file on the computer server
Intake	
Applications	Original and the most current, the Life of the Binder
Completed Person Receiving Service Orientation Checklist	Original and the most current, the Life of the Binder
Miscellaneous Forms and Correspondence	3 years, previous relevant documents are uploaded to the individual's file on the computer server