

## PATHWAYS ABILITIES SOCIETY

### **POLICY: RETENTION, ADMINISTRATIVE FILES, RECORDS AND DOCUMENTS**

**Applies to:** Management and Supervisors

Original Approval Date: September 19, 2016

Date Board Approved: November 23, 2020

Replaces Policy Dated: March 27, 2017

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Board Member's Signature

### **PREAMBLE**

Pathways Abilities Society management and supervisory staff must ensure that all society activities are recorded and records and files are kept for the appropriate length of time as required by contracts and various provincial and federal government regulatory bodies.

### **POLICY**

Pathways Abilities Society adheres to the record retention periods outlined in contracts and by provincial and federal government regulatory bodies. Pathways maintains all finance, personnel and individual's information and records for a 10 year period.

For historical purposes a copy of the following documents will be kept for the life of the organization: Certificates of Incorporation, Constitution and Bylaws, Annual General Meeting booklets, Newsletters, History booklets, Board of Director list, Membership lists, Board of Director meeting minutes and Audited Financial statements.

Documents that are not identified through contracts or a provincial or federal regulatory body and have no definitive purposes for paper copies to be maintained, will be scanned and uploaded to the appropriate file. Examples include, Pathways original policies, procedures, forms, home share provider applicants who have not yet contracted with Pathways, etc.

The finance manager or designate in the month of April relocates the previous fiscal year i.e. 2010/2011 finance and administrative printed records (payables, receivables, payroll records and information, bank statements and reconciliations, GST statements, Minister of Finance documents, General Ledger documents, insurance documents, contracts, expired documents, health benefit documents, pension documents, Work Safe BC documents, etc.) to file drawers in his or her office. They creates new files for the new fiscal year i.e. 2011/2012. Files from the prior fiscal year i.e. 2009/ 2010 are boxed, labeled 2009/ 2010 and relocated to storage. The box number and contents are listed in the ShareVision "Accounting Banker Box Number and Content" list.

The leadership staff in the month of April reviews their printed records and files. Records or files that expired or are no longer needed and are required to be retained are boxed, labeled with the relevant fiscal year and relocated to storage.

Files and records can only be destroyed after the retention period and by shredding the documents.