

## **Instructions for Unit Guiders on Forms Retention**

New guidelines from our national office will help us better protect the personal information of girl and adult Members. Most forms that are completed by Members in your unit must be sent to your iMIS home (Bridging Rivers Area office, Southern Horizons Area office, or Provincial Office), where screened staff members will manage them in accordance with provincial and federal privacy legislation.

Completing this paperwork is already part of being a responsible Guider, so this process of organizing and transferring must be thought of as a duty of a responsible Guider as well. You will need 9" x 12" manila envelopes to transfer the forms in. There is a Forms Retention Sheet available for download on our Provincial website, which you will print off, affix to the envelope and use to keep track of what is inside. Please use one envelope for each unit event/activity or purpose.

Why is this system being put in place? In order to comply with privacy legislation and to protect the privacy and safety of our girl and adult Members, Saskatchewan council decided the safest place for personal information is in the province's three iMIS homes. The confidentiality of the forms will continue to be protected by the staff members.

### **How to complete**

1. Fill in your unit's name, district and area, your name, and the date of the activity/event that the forms inside relate to on a printout of the downloadable Forms Retention Sheet.
2. Write a brief description of the activity/event or purpose. This should be something simple but descriptive, like "Camping trip", "Cookie baking at meeting" or "sleepover".
3. Place a checkmark under "Enclosed?" next to each type of form that is in the envelope beside the appropriate form number.
4. Affix the Forms Retention Sheet to the envelope and seal the envelope.

### **How to keep forms safe**

1. Send the forms to your iMIS home immediately following the activity/event.
2. Do not keep copies of the forms. The reason for transferring the forms to the iMIS homes 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.
3. If you have electronic copies of forms such as Word documents or PDFs, 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.

## **What do I do with...?**

As we all know, there is a lot of paperwork that goes through a unit. The following table should help answer your questions.

- A.7:** This Non-Member Volunteer form must be submitted to your iMIS home immediately upon its completion.
- INS.01:** All Incident Reports must be sent directly to National Office within five (5) days from the date of the incident. Fax (416) 487-5570 or mail to 50 Merton Street, Toronto, ON M4S 1A3, Attention: Finance & Administration Department. Please fax a copy to the provincial office so that we are aware of the incident.
- Safe Guide (event/activity) forms:** Most forms relating to an event/activity are transferred to your iMIS home using the process outlined above after the event is over. Please refer to the Forms Retention Sheet for those forms that should be submitted.

## **Forms and documents that do not transfer**

There are several forms that you do not need to worry about transferring, although you do need to be sure that you destroy them safely by shredding them or return them to parents/guardians as appropriate. These forms are as follows:

- H.1 and H.2 forms:** Are returned to the Members or parents/guardians at the end of an event or activity or at the end of the Guiding year, or are shredded.
- INS.02 forms** Must be faxed or mailed to the GGC insurance brokers (B.F.L. Ontario Inc.). The original form is to be retained by the unit until the end of the current year, plus one more year, and then destroyed.
- Copies of travel documentation:** Such as copies of passports, visas, birth certificates, citizenship, and travel and health insurance must be shredded immediately after the event is over.
- Copies of any forms:** That are made as part of processing the form (for example, a copy may be sent to the iMIS site for entry, or to a commissioner to gain authorization) must all be shredded.
- Financial records and minutes:** Are to be kept by your unit if your unit created them. Minutes of meetings must be kept indefinitely; financial statements must be kept for a period of seven (7) years, as per legislation.