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DATA/RECORD MANAGEMENT

Rationale

Maintaining accurate data/records management helps ensure accountability, confidentiality and security of all internal documentation and records stored electronically or on paper; as well as continuity of the daily operations of Bethesda.

Policy

Collect and maintain accurate records and databases, which include but are not limited to, finance and administration records, personnel records and databases.

Maintain an internal control system and regularly complete audits of these systems to ensure accuracy and security of all information. All personal records of people who receive support, their families, or related parties of Bethesda are kept in a database or information system that is maintained in a manner assuring privacy.

Procedure

Data Reporting

Collect, maintain and provide reports on the following databases:

- Finance
- Human Resources
- Consumer information
- Statistical programs/service data
- Others as may be required

Access to Information

Only authorized parties have access to information records. Security precautions are established and practiced to protect personal and confidential information and files.



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- **Electronic Information**
 - All information systems are protected by individual passwords. Only people who have been authorized/designated by the Chief Executive Officer can have access to or view records in the information systems.

- **Paper Filed Information**
 - All paper records are stored in a locked cabinet or locked office space and keys are available to authorized person(s) only.

Disclosure of Information

- A person's right to privacy is considered in any sharing of information.
- Every effort is made to ensure that all information collected and/or shared is accurate and complete.
- Any disclosure of information adheres to the Bethesda Privacy Policy.

Storage and Destruction of Records

- Archived files are stored as required by law and Generally Accepted Accounting Principles.
- Records pertaining to each person receiving support including: support details, medical findings and recommendations are kept for a minimum of 20 years after the last entry.
- Financial records are maintained as per provincial and federal regulations. Details are retained for 7 years. Trial balances are retained indefinitely.
- Personnel records are maintained as per provincial and federal regulations.
- Destruction of records is authorized and supervised as per provincial and federal policies.



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System Audits

- There are ongoing review processes for all information systems.
- Records and data are audited by internal personnel and external bodies as applicable to ensure compliance with all legislation.