

## Manual of Administration

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| <b>TOPIC:</b><br>Administration | <b>SUBJECT:</b><br>Central File/Archives<br>Information | <b>Code:</b> AD021            |
|                                 |                                                         | <b>Date of Issue:</b> May/95  |
|                                 |                                                         | <b>Revised:</b> November 2005 |
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**PURPOSE:** This policy will clarify what information will be stored in the Archive for the people we support and for what period of time. This is in accordance with the Ministry of Community and Social Service Guidelines.

Archive - place where records are kept. The following is a list of information/forms that will be kept in the archive: Release of Information, Agreement for Service, correspondence from other agencies, medical information, Contact Sheets, Log Sheets, Incident Reports, Personal Summaries, Individual Service Agreements (ISA's), and Personal Profiles and Personal Planning Meeting minutes for previous year(s).

Central File - every person receiving service from Avenue II will have an individual file kept in the central filing cabinet. Once a year, or on completion of a personal planning meeting, the Manager will remove outdated information from the file. The Manager may assign this duty to the support workers. Listed below is a description of the information/forms included in the central file and the duration of time they will be stored in the archive.

### **DURATION:**

**CURRENT FACE SHEETS:** Date, name, address, telephone number, emergency contact, medical/personal information, etc. Face sheets are reviewed and updated at personal planning meetings. Old Face sheets are destroyed.

**RELEASE OF INFORMATION:** A signed statement giving permission for Avenue II to share information with different agencies and significant others. Release of Information forms are reviewed and updated at every personal planning meeting. Release of Information forms will be kept for twenty (20) years after discontinuation of Avenue II support.

**INDIVIDUAL SUPPORT AGREEMENTS:** ISA's will be kept on file for five (5) years.

**AGREEMENT FOR SERVICE:** Statement agreeing to receive services, informing Avenue II of any changes to information, authorizing Avenue II to deal with an emergency, and releasing Avenue II of any liability. Agreement for Service forms will be kept for twenty (20) years after discontinuation of Avenue II support.

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**CORRESPONDENCE FROM OTHER AGENCIES:** Letters, communication reports, faxes, assessments, memos, etc. All pertinent information will be kept for twenty (20) years after discontinuation of Avenue II support.

**CONTACT SHEETS:** Recording of conversations with individuals, other agencies/significant others, staff, and their outcome: used to record appointments, meetings, etc. All pertinent information will be kept for twenty (20) years after discontinuation of Avenue II support.

**LOG SHEETS:** Daily information recorded about support received, activities participated in, appointments/meetings attended, staff information sharing, etc. Log sheets will be kept on file for a period of three (3) years.

**INCIDENT REPORTS:** Record of injuries, damage to property, medications missed, unusual behaviour. Incident Reports will be kept for twenty (20) years after discontinuation of Avenue II support.

**PERSONAL SUMMARIES:** Identifies in what areas the individual is being supported to be as independent as possible. Information pertaining to N.E.I.G.H.B.O.U.R.S., Community Living Skills, and Employment Support Services is detailed, with all progress noted and recommendations made. Personal Summaries will be kept for twenty (20) years after discontinuation of Avenue II support.

**PERSONAL PLANS AND PERSONAL PLANNING MEETING MINUTES:**

**Personal Plans** contain personal history, relationships, places, information past/present and future about the individual, barriers and recommendations to inclusion, goals are identified, interests, capabilities, choices, and support needed.

**Personal Planning Meeting Minutes** are a review of the individual's Personal Summaries; sets goals and objectives for the upcoming year; reviews Face sheet, Release of Information, Individual Support Agreement, Agreements for Service forms, etc. Personal Summaries and Personal Planning Meeting minutes will be kept for twenty (20) years after discontinuation of Avenue II support.