

KELOWNA AND DISTRICT SOCIETY FOR COMMUNITY LIVING

POLICY: SERVICE RECIPIENT FILES AND RECORD OF EFFECTS

Applies to: All Personnel, Volunteers, Service Recipients, Families, Advocates and Caregivers

Every person KDSCL provides service to has his or her 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.

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

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, *date of 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 asterisks* beside it is voluntary.

The Service Recipient 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 KDSCL if there is a change in the person's information.

All Service Areas except 1976 Richter Street

Section Title	Binder "Original" Section Retention Period	Service Recipient File in locked Filing Cabinet
Service Checklist (filed in section stated below once completed)	See below	N/A
Service Recipient Orientation (filed in section stated below once completed)	See below	N/A
Individual Information	See below	N/A
Picture	Life of Binder, update periodically	N/A
Individual Information Sheet	Most current	Shredded

Plans/IF/Contracts	Most current, previous are filed in Old Information section (see below)	N/A
Service Recipient Consent and Community Support	Most current	10 years
Employment & Volunteerism		
Resume	Most current	10 years
Work Skills for Employment	Most current	10 years
Original Training Plan	Most current	10 years
Volunteerism	3 years	10 years
Protocols	Most current	10 years
Medication Information	Most current	10 years
Disability Information	Life of the binder	N/A
Health (Miscellaneous)	3 years	10 years
Intake	See Below	N/A
Referral	Life of Binder	N/A
Applications	- Original hand written, the Life of the Binder	10 years
Discovery	Life of Binder	N/A
Service Recipient Service form(s) (formally Entrance to Service forms)	- Original form the Life of the Binder - Transfers, decrease, etc. 1 year	10 years
Completed Service Checklist and Orientation (kept at the front of the binder until completed)	Life of the binder	N/A
Miscellaneous Forms and Correspondence	3 years	10 years
Old Information	3 years of: ISP Prep forms, ISP's, ISP Reviews and Contracts	10 years

1976 Richter Street

Order of information, BOLDED is tab section title	Binder "Original" Section Retention Period	Service Recipient File in locked Filing Cabinet
Pouch containing identification (medical card, passport, birth certificate, etc.)	NA	NA
Service Checklist (filed in section stated below once completed)	See below	N/A
Service Recipient Orientation (filed in section stated below once completed)	See below	N/A
Individual Information		N/A
Picture	Life of Binder, update periodically	N/A

Individual Information Sheet	Most current	Shredded
Plans/IF/Contracts	Most current, previous are filed in Old Information section (see below)	N/A
Service Recipient Consent and Community Support	Most current	10 years
Protocols	Most current	10 years
Medication Information	Most current	10 years
MAR Sheets		
Medical Visit Reports		
Medical Forms Internal	Last 20 reports	10 years
Health Miscellaneous	3 years	
Disability Information	Life of Binder, update periodically	N/A
Personal Belongings forms	Life of the Binder	
Intake		N/A
Applications	- Original hand written, the Life of the Binder - Last updated application, the remainders are filed in SR file	10 years
Referral, Service and Orientation Checklist	Life of Binder	N/A
Miscellaneous Forms and Correspondence	3 years	10 years
Old Information	3 years of: ISP Prep forms, ISP's, ISP Reviews and Contracts	10 years
Financial Information kept in separate binder. Retained for a 10 year period.		

Effective/Revision Date

1993
April 28, 2003
January 26, 2004
May 30, 2005
June 12, 2006
April 7, 2008
September 29, 2008
December 18, 2008
May 17, 2010
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Board Approval

1993

Date Approved

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April 28, 2003
January 26, 2004
May 30, 2005
June 12, 2006
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