



Policy Title: Document Management	
Approved by: S.O.A.R. Board of Directors	Approval Date: 9 June 2021

Document Management

Document Management is the lifecycle of the records that S.O.A.R. keeps. It is the acquisition of documents from one or more sources, the custodianship, and the distribution of that document to those who need it, and its ultimate disposal through archiving or deletion. The purpose of this policy is to state what records S.O.A.R. keeps and why they are kept (collection); how they are stored and who has access to them (storage); how long records are kept (retention); and how S.O.A.R. disposes of the records (disposal).

Survivors of Abuse Recovering (S.O.A.R.) is committed to protecting the sensitive data of S.O.A.R. and its members. This policy is written for personal information, official documents, and unofficial documents.

Types of documents

Types of documents fall into these categories:

- (1) Personal information
- (2) Official documents:
 - (a) Registry of Joint Stocks related documentation
 - (b) Canada Revenue Agency related documentation
 - (c) Financial records and reports
 - (d) Board meeting minutes
 - (e) Policy documents
 - (f) Annual General Meeting reports
 - (g) Project documentation, including funding proposals and project reports
- (3) Unofficial documents:
 - (a) Committee meeting minutes
 - (b) Training documents
 - (c) Public relations material
 - (d) Peer support resource documents
 - (e) Working/draft/transitional documents.

Collection

- S.O.A.R. adheres to Canada's [Personal Information Protection and Electronic Documents Act](#).
- From a member, S.O.A.R. gathers name and contact information for the purpose of communicating within S.O.A.R.
- From a peer, S.O.A.R. gathers name, age, contact information, hometown, transportation accessibility, name of assigned peer supporter, dates of referral and dates of match, for the purpose of facilitating peer counselling.
- Official documents both received and/or created by S.O.A.R. See above definition of "official documents".
- Unofficial documents both received and/or created by S.O.A.R. See above definition of "unofficial documents".

Storage

- Personal Information (name and contact information)



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- Personal information of members (names and contact information) shall be encrypted and stored on a designated secure S.O.A.R. server and never to be stored in “the Cloud”.
- Access to personal information of members shall be restricted to S.O.A.R. members only.
- Personal information of peers (names and contact information) shall be encrypted with password-protection and stored on the S.O.A.R. office computer. It is never to be stored in “the Cloud” nor ever transmitted over the internet (i.e. e-mailed).
- Access to personal information of peers shall be restricted to those within S.O.A.R on a need-to-know basis.
- Hardcopy personal information shall be surrendered to the S.O.A.R. office at the earliest opportunity. Peer information in hardcopy format shall be filed in a locked cabinet in the S.O.A.R. office.
- Electronic peer forms and records shall be kept on the official S.O.A.R. office computer only.
- Electronic Peer Supporting reports generated using an on-line form shall be kept only in the S.O.A.R. database for that purpose. No peer identifying information shall be kept in the database.
- Personal information shall never be sold or given to another entity outside S.O.A.R.
- Official documents
 - S.O.A.R. official documents shall remain within the control of S.O.A.R.
 - Official documents shall not be stored on a personal computer except at the S.O.A.R. office, the S.O.A.R. website, and the S.O.A.R. designated Shared Drive in “the Cloud”. Official documents that can be read by members only or the public at large shall be maintained on the S.O.A.R. website. Official documents that are meant for committee members and/or Board members shall be maintained on a shared drive.
 - Peer supporters, members, and volunteers are responsible for appropriately safeguarding peer and S.O.A.R. records.
 - Access control shall be managed, monitored and enforced by the Officers of S.O.A.R.
- Unofficial documents
 - Unofficial documents shall not be stored on a personal computer except at the S.O.A.R. office, the S.O.A.R. website, and the S.O.A.R. designated Shared Drive in “the Cloud”. Unofficial documents that can be read by members only or the public at large shall be maintained on the S.O.A.R. website. Unofficial documents that are meant for committee members and/or Board members shall be maintained on a shared drive.
 - Access control shall be managed, monitored and enforced by the Officers of S.O.A.R.
- Backup
 - The backup media shall be the property of S.O.A.R. and remain under the care and control of S.O.A.R. or its designated agent.
 - The most recent backup shall be stored onsite. The next-to-most backup shall be stored at a designated location offsite.

Retention

- Personal information of peers shall be kept only as long as the peer is being supported by S.O.A.R. plus two years.
- Personal information of members shall be kept only as long as the member remains in good standing plus two years.
- All official S.O.A.R. documents shall be kept in accordance with [Canada.ca ->Taxes->Charities and giving->Operating a registered charity->Books and Records](#)



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- All unofficial S.O.A.R. documents may be kept as long as the Board deems appropriate for the operation of S.O.A.R.

Disposal

- Deletion of official S.O.A.R. documents may take place only within the retention guidelines of this document and with the agreement of all the Officers of S.O.A.R.
- Electronic devices with any member's personal data on it shall never be passed to an outside entity without being electronically wiped with software that does at least three overwrite passes.