



Girl Guides  
of Canada  
Guides  
du Canada

British Columbia Council

## Instructions for Unit and Responsible 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 through the District and Area Commissioners to the provincial office, where trained and screened staff members will manage them in accordance with provincial and federal privacy legislation.

For the purposes of document retention, Independent Group Trips will be handled as a “unit.” See the section below on Independent Group Trips. In any case, these instructions will prove to be a useful document for Guiders at every level.

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 8.5” x 11” manila envelopes to transfer the forms in. There is a label available for download online at <http://www.bc-girlguides.org/resources/forms/document-retention/> which you will print off, affix to the envelope with tape and use to keep track of what is inside. Please use one envelope for each unit event/activity or purpose. In this guide, you will find examples of completed labels.

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, BC Council decided the safest place for personal information is in the provincial office. The envelopes **will not** be opened by anyone who has not undergone the same screening as you did to become a Guider. The confidentiality of the forms will continue to be protected by the staff members.

### How to complete

1. **Fill in** your name, your unit’s iMIS number and the date of the event/activity that the forms inside relate to on a printout of the downloadable label.
2. **Write a brief description** of the event or purpose. This should be something simple but descriptive, like “Camping trip,” “Cookie baking at meeting” or “New Members/renewals-Fall 2009.”
3. **Fill in** the number of each type of form that is in the envelope beside the appropriate form number.
4. **Affix the label to the envelope using tape and seal the envelope.**

### How to keep safe

**Keep the envelopes safe** by keeping them in the safest possible place in your home. They should be kept an area in which they are at the least risk of being accessed by others or accidentally thrown

away. We suggest keeping them in a file box (cookie boxes work well), somewhere off the floor, in case of a flood.

### Bringing them to your District Commissioner

1. **At every district meeting**, bring all the labeled envelopes you have put together to your District Commissioner. She will ensure that the documents arrive safely at the provincial office. **This process is ongoing**; do not “save up” forms for longer than you have to. Give the forms to your District Commissioner every time you meet with her. Your unit may want to designate a person to bring the forms from all responsible Guiders in your unit to the district meeting. Please do not mail the forms; physically bring them to your District Commissioner.
2. **Do not keep copies of the forms.** The reason for transferring the forms to the provincial office 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. Exceptions are the A.5 and A.5R forms and some trip planning forms—see the table below.
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.

|                               |   |
|-------------------------------|---|
| <b>Adult membership forms</b> | <p>Changes to Member Records (A.4 forms) are to be shredded immediately after input into iMIS. Immediately upon completion, photocopies of the first page of the A.1 and IR.1 forms need to be sent to your iMIS site for data entry. The rest of the adult membership and screening forms are kept together until the application for a Member is complete; they are then sent directly to the provincial office for filing.</p>   |
| <b>A.5 and A.5R</b>           | <p>You need the information on the A.5 and A.5R forms for the year to have emergency contact and pick-up information on hand. Continue to send a photocopy of the first page to your iMIS site for data entry; also make a copy for yourself. While it’s ideal to package all of the forms for a unit together, please do not hold back the ones you have while you wait for stragglers. The copies must be sent to iMIS and the originals transferred to the provincial office through your District Commissioner as soon as the forms are received. Transfer the originals immediately to the provincial office through your District Commissioner using the process outlined above. While the copies are in your possession, you must keep them safe and secure, protecting them from loss, damage or unauthorized access.</p> |

|                                     |  |
|-------------------------------------|--|
| <b>IR.1 Image release forms</b>     | Send a photocopy of IR.1s to your iMIS site for entry. You may have a number of forms to package all together, but please do not hold back the ones you have while you wait for stragglers. The copies must be sent to iMIS and the originals transferred to the provincial office through your District Commissioner as soon as the forms are received. If the IR.1 is part of an adult Member application, it is kept with the rest of the membership application until everything has been completed; the entire application is then sent directly to the provincial office for filing. If the IR.1 is for a girl Member, it is transferred to the provincial office through your District Commissioner using the process outlined above. |
| <b>Event/activity forms</b>         | Most forms relating to an event/activity are transferred to your District Commissioner using the process outlined above after the event is over. H.1 and H.2 forms are exceptions to this rule—see the following section, <b>Forms and documents that do not transfer</b> , for details.   |
| <b>GSUSA forms</b>                  | GS.3 forms are to be transferred to your District Commissioner using the process outlined above after the related event is over.   |
| <b>Activity/trip planning forms</b> | As the responsible Guider planning a trip or activity, you have the complete set of original documents relating to that trip or activity. These must all be filed together in one envelope and transferred to your District Commissioner using the process outlined above after the related trip or activity is over. If you want to keep copies for future reference, you may, <b>but only those documents that do not contain personal information.</b>  |

If you have additional questions, please contact your District Commissioner or the provincial office.

### **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:

**A.4 forms** (Adjustments to Member Records) must be shredded immediately after input into iMIS.

**B.1 forms** (Unit/Council Forms) must be shredded immediately after input into iMIS.

**H.6 forms** for Members injured during trips must be given to the injured person.

**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.

**INS.02 forms** must be faxed or e-mailed to the GGC insurance brokers (BFL Canada). 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 and birth certificates, 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 at the level which created them. Minutes of meetings must be kept indefinitely; financial statements must be kept for a period of seven (7) years, as per legislation.

### **Independent Group Trips**

Independent Group Trips can be organized by Guiders at any level. At the completion of a trip, the Guider doing the planning must forward, as with any event, the complete set of documents relating to the trip. This will include health forms, permission forms, planning forms and possibly others like camping and water forms, depending on the nature of the trip. With the exception of forms noted in the **Forms and documents that do not transfer** section above (such as copies of travel documentation and H.1/H.2 forms), **all of the forms must be transferred to the provincial office, through the District or Area Commissioner as appropriate.** This must be done in the manner described above—all of the forms together in a clearly labeled envelope. **All duplicate copies, including copies given to emergency contacts must be shredded after the trip.**

### **Screening and adult Member application forms**

The procedures for new adult Member screening and application forms have not changed. Immediately upon completion, a copy of the A.1 and IR.1 should be sent to the iMIS site for entry; the rest of the forms are kept together until a full membership application is complete. At that time, the entire application is to be sent to the provincial office for filing, as per the current adult registration procedure.

### **Protocol for incidents**

This updated process for managing forms does not change the protocol for reporting incidents. As defined in *Safe Guide*, an incident is “an illness, injury, discipline problem, conflict, frightening situation or any unusual or unexpected occurrence.” Responsible Guiders are required to report all incidents using the INS.01 forms.

**Part A** of the INS.01 form is filled out and a copy sent to your Commissioner. A copy is also sent to the camping adviser with the SG.3 Activity Notification or Authorization form if the incident occurred at camp. The original form must be kept with the rest of the forms relating to that activity in the same envelope. Be sure to indicate that an INS.01 form is included by indicating it on the label. The whole envelope must be transferred to your District Commissioner using the process outlined in this document.

**Part B** of the INS.01 form is filled out in addition to Part A when the **incident is serious, as defined by *Safe Guide*.** Along with the other required documentation, the INS.01 form must be sent directly to the national office within five (5) days of the incident. As per instructions in *Safe Guide*,



## Example 2

|  <b>BC Council</b> → <b>Forms-envelope-labels</b> |       |       |          |   |      |  |  |  |  |  |  |
|--|-------|-------|----------|---|------|--|--|--|--|--|--|
| <i>Please affix this label with tape to the outside of the envelope</i>  |       |       |          |   |      |  |  |  |  |  |  |
| Responsible Guider(s) <b>Jane Smith</b>  |       |       |          |   |      | Date of event/activity <b>January 25, 2010</b> |  |  |  |  |  |
| Unit, district or area name (eg. 1 <sup>st</sup> Vancouver Brownies)   |       |       |          |   |      | <b>22 Burnaby Guides</b>                       |  |  |  |  |  |
| Unit, district, or area iMIS number <b>10059674</b>  |       |       |          |   |      |  |  |  |  |  |  |
| Description of event/activity, or function of forms inside   |       |       |          |   |      | <b>New girl forms/renewals</b>                 |  |  |  |  |  |
| <i>Please indicate the number of forms of each type</i>  |       |       |          |   |      |  |  |  |  |  |  |
| INS.01   | WA.3  | STG.2 | BCIP504  | BCC312  | A.1  | S.1  |  |  |  |  |  |
| SG.1   | GS.3  | STA.1 | BCIP504A | BCC402  | A.2  | S.2  |  |  |  |  |  |
| SG.2   | IT.2  | STA.2 | BCI500F  | BCC403  | A.5  | S.3  |  |  |  |  |  |
| SG.3   | IT.3  | STS.1 | BCI700A  | BCC404  | A.5R |  |  |  |  |  |  |
| SG.4   | IT.4  | STS.2 | BCC306   | BCC406  | A.7  |  |  |  |  |  |  |
| SG.5   | IT.5  | H.3   | BCC307   | BCC3  | IR.1 |  |  |  |  |  |  |
| SG.6   | IT.6  | H.4   | BCC308   |   | R.3  |  |  |  |  |  |  |
| SG.7   | IT.7  | H.5   | BCC309   | IR.1—submit in separate envelope marked 'IR.1'—are retained indefinitely  |      |  |  |  |  |  |  |
| WA.1   | IT.8  | H.6   | BCC310   | Financial & accounting records must be retained at the level where they were created.   |      |  |  |  |  |  |  |
| WA.2   | STG.1 | H.7   | BCC311   | Please contact the Office Manager at <a href="mailto:officemgr@bc-girlguides.org">officemgr@bc-girlguides.org</a> or 604-714-6636 for assistance. |      |  |  |  |  |  |  |
| OFFICE USE ONLY: Retention period: <input type="text"/>  |       |       |          |   |      | Destruction date: <input type="text"/>         |  |  |  |  |  |

Jane has correctly filled out her **name**, a reference **date** for the enclosed forms, her **unit name** and **iMIS number**, and included a brief but descriptive sentence that describes the purpose of the forms inside the envelope. She has included all of the registration forms from this fall, and has not included any unrelated forms in this envelope. She correctly indicated how many of each form are inside the envelope.