

OCDS RECORDS MANAGEMENT

This policy does NOT affect the local Community's own records for members in formation nor does it affect the Central Office's paper records for transfers. Those are addressed in a separate Policy on Member Files. The purpose of this policy is to move from paper to electronic records for the OCDS Central Office Permanent Record Form.

This will allow the OCDS Permanent Record Form to be filled out and updated electronically, to be kept both by the local Council and in a Provincial digital record location (currently pCloud) established for that Community. It eliminates the need to mail paper copies to the Province and enables the Central Office Administrator (COA) to search the records electronically. It also provides a backup copy of the local Community's copy of the Permanent Record Form. Should these records be lost, they can be restored from the Provincial Records Management folders.

Once the Permanent Record Form's electronic copies are created, it will be possible to create both a local Community Directory and a Province-wide Directory automatically using a Microsoft Word procedure provided by the COA.

The Province will also be able to inform Communities whether an individual seeking to become a member of its local Community is ineligible based on the past action of another OCDS Council, for instance, if they have been previously dismissed from the OCDS.

Community Information

These electronic forms will ultimately replace all paper forms previously used in the Province:

- The individual's Permanent Record Form
- The Transfer and Acceptance Form (to be used whenever a person transfers into the Community)
- A Guest Form (use of this form is optional)

Roles and Responsibilities

Local Council

- Establish the role of Records Manager for the Community and appoint a Record Manager.
- Establish a local Records Management Policy that provides further guidance on how the forms are completed.

- Ensure that the local records policy and that of the Province are followed.

Individual Member

- Fill out your Permanent Record Form according to Provincial and local requirements. A blank form is available – <https://www.thereocds.org/forms>
- Update the information on the record form whenever there is a change, especially to status, phone, or address, and provide this to the local Records Manager as directed in your local Community procedure.

Records Manager

- Follow any additional requirements found in the local Community's Records Management policy.
- Review the individual Permanent Record Form as submitted by members and in the Community's current records to make sure they are accurate, especially the Formation Level and status field of the individual. Make sure the form is saved with the individual's name (lastname_firstname.docx) into the OCDS Records folder on a computer.
- If a person leaves the Community, fill out Sections V and VI of their Permanent Record Form and update the Status Field and Current Date.
- Upload the Permanent Record Form to the Provincial cloud storage area when the Community initially transitions from paper records to electronic records, when there are Status changes, at the end of the calendar year, and as requested by the COA or your local records management policy.

Important: The Records Manager should access the Provincial digital records location (currently pCloud) at least once every six months. If -this is not done, the RM will be locked out and will need to contact the COA to reactivate the account.