

Instructions for Area Commissioners 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 area 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.

The District Commissioners will collect forms in an organized fashion from the units in their district. They will then bring those forms, along with their own, to you at your area meetings for subsequent delivery to the provincial office. You can also expect forms to be transferred from your area's international adviser, camping adviser and training adviser. Your responsibilities are outlined below.

Receiving the forms

The District Commissioners and the various advisers will bring the forms to you, already labeled and sealed in envelopes, at your meetings.

Alternately, you may decide at the area level that a mail-in system works better for you. In this case, the District Commissioners will be mailing their forms directly to the provincial office.

Inspecting the forms

There is generally no need for you to open the envelopes and inspect the forms one by one. It is the responsible Guider's job to include all of the necessary forms for the event, activity or function that the forms relate to. However, if you do notice from the label on the outside of the envelope that it appears the responsible Guider has forgotten to include certain forms that should be there, please do contact the appropriate responsible Guider.

Keeping them safe

You will eventually bring the forms to the provincial office, but in the meantime, it is your responsibility to keep them safe. Please keep them in the safest possible place in your home. They should be kept in an area in which they are at the least risk of being accessed by others or accidentally thrown away. We suggest keeping the boxes transferred from the districts somewhere off the floor, in case of a flood. Any loose envelopes should be in boxes if they are not already (cookie boxes work well for this purpose).

Getting them to the provincial office

During your next meeting at the provincial office, bring along your box(es) of forms and leave them with the provincial office staff.

If you prefer to mail or ship them, this is also an acceptable method of transfer. They must be sent by either registered mail or Xpresspost. As mentioned, in your area, it may have been decided that District Commissioners and advisers will ship the forms directly to the provincial office.

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.

Your own forms

In your work as an Area Commissioner, you will find yourself responsible for forms, such as forms from training. This paperwork must also be transferred to the provincial office. We request that you compile your forms relating to one function, event or activity into an envelope, and use the same labels the Unit and responsible Guiders use to label the envelope. The label is available for download online at <http://www.bc-girlguides.org/resources/forms/document-retention/>. A label needs to be printed off, completed and affixed to the envelope with tape; the envelope must then be sealed. There is one label for training forms and a separate label for all other forms. You might also find it helpful to read the *Instructions for Unit and Responsible Guiders on Forms Retention*, available online at <http://www.bc-girlguides.org/resources/forms/document-retention/>, particularly if you are organizing an Independent Group Trip. There are examples of completed labels included in that document. Transfer your forms, in envelopes, to the provincial office, with the forms from your District Commissioners and advisers.

What do I do with...?

As we all know, there is a lot of paperwork that goes through a unit, district and an area. The following table should help answer your questions.

Adult membership forms	Adjustments 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.
A.5 and A.5R	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.

IR.1 Image release forms	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.
Event/activity forms	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 H2 forms are exceptions to this rule—see the following section, Forms and documents that do not transfer , for details.
GSUSA forms	GS.3 forms are to be transferred to your District Commissioner using the process outlined above after the related event is over.
Activity/trip planning forms	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, but only those documents that do not contain personal information.

If you have additional questions, please contact 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 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*, please send a photocopy of the INS.01 form in these cases to the provincial office—this can be done by including a photocopy with the rest of the forms from the same activity. 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.