



Coworker Records Management

POLICY

All information pertaining to any Cascadia Society coworker will be held safe, secure and confidential. Information will only be released if written approval is received from the coworker or a legal request has been received (*See Human Resources Policy # 2 - Confidentiality*).

PROCEDURES

COWORKER AND CONTRACTOR RECORDS

The Cascadia Society maintains a coworker filing/record system that supports the maintenance of all individual confidential information for each coworker. All coworker files are held in a secure locked setting accessible only by key. Designated management maintains control of this key and ensures its whereabouts is recorded and monitored. Coworkers can request to review their personnel file at any time during business hours. The Business Director or Leadership Team are responsible for responding to requests made as well as accessing the file, monitoring the file review and returning the file to its secure location. All requests and file reviews are documented, signed and dated. Coworkers can view their file in privacy from other coworkers but must have a monitor from Leadership Team. Coworkers can request to have any personal information photocopied which the Leadership Team member or designate will complete. No coworker file can be removed or taken off site from Cascadia.

PERSONAL CONTACT INFORMATION

Under no circumstances will personal contact information including but not limited to, home phone numbers of coworkers (present or former), be given to clients (present or former), collateral contacts or any other persons without the prior knowledge and expressed permission of the coworker involved. If a request is made for such information, the person receiving the request will:

- State politely but firmly that it is against Society policy to provide personal contact information, however if provided a message, every effort will be made to forward the message onto the coworker.
- If the caller suggests that it is an emergency, or some type of urgent situation, the person receiving the request will offer to pass along a message immediately while explaining that there is no guarantee the party can be reached immediately.
- If the caller persists, and is dissatisfied, the person receiving the request can direct the caller to the Leadership Team member or designate for further attention.



Coworker Records Management

RELEASE OF INFORMATION

Information about any coworker will not be released without appropriate authorization or legal request.

Standards associated with this policy: 1) 1.E.1, 2) 1.E.3, 3) 1.I.4, 4) 2.A.13 and 5) 2.A.15

RESPONSIBILITY OF: Business Director

MONITORED BY: Leadership Team