



pathways  
southwest

Towards better mental health

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# Information Retention and Archiving Policy & Procedure

APPROVED BY: Pathways SouthWest Board of Management

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THIS POLICY & PROCEDURE APPLIES TO: Pathways SouthWest Board of Management, Staff, Students, Volunteers, Consumers, Carers, other Stakeholders and the General Public

## Information Retention and Archiving

### Policy & Procedure

#### Policy

All information (electronic and hardcopy), on Pathways SouthWest (Pathways) systems should be treated as confidential. This includes but is not limited to emails, data, reports and correspondence. This information in its entirety is the property of Pathways.

#### Procedure

**All Pathways information is categorised into classifications with retention guidelines. All categories include retention of legal documentation:**

- 1. Administrative Correspondence (7 years)**  
Pathways Administrative Correspondence includes, but is not limited to, management information and project-related correspondence.
- 2. Fiscal Correspondence (7 years)**  
Pathways Fiscal Correspondence includes all information related to revenue, expenses and legal information for the organisation.
- 3. General Correspondence (7 years)**  
Pathways General Correspondence covers information that relates to operational decisions of the organisation.
- 4. Ephemeral Correspondence (Retain until read and then destroy)**  
Pathways Ephemeral Correspondence is by far the largest category and includes personal email, email dealing with the work of the day, and email containing information outdated by events. Staff may destroy this after reading. This is not considered to be General Correspondence.
- 5. Correspondence involving intellectual property (No time limit)**  
Any correspondence that involves the creation of any intellectual property rights shall be retained by the organisation as per individual employment contracts.
- 6. HR Employee Related Information (10 years after they have left the organisation)**  
Pathways HR Employee Related Information covers HR and payroll information related to any employee.
- 7. Clinical information (No time limit)**  
Pathways Clinical Information covers all information related to consumers and carers including but not limited to personal, clinical and correspondence covers
- 8. Storage**  
All Pathways electronic information is stored on the server and backed up on a daily basis. There are 3 x external hard drives that alternately connected to the server, with 2 x copies removed from site by 2 different Business staff. This ensures information integrity.