

WHAT IS A RECORD?

Records are documents created, received, and maintained by Health PEI as evidence and information to support legal and business activities.

Records are found in various formats and are kept by any individual during their course of employment with Health PEI.

It is everyone's responsibility to manage records and follow approved retention schedules and processes.

Examples:

- Documentation recording patient/client/resident information, medical history, diagnosis, treatment, etc.
- Policies, final reports and recommendations
- Final meeting minutes and agendas
- Workplans, schedules, timesheets, assignments and performance results
- Materials that support a business decision or transaction
 - Agreements and Contracts, Tendering & Procurement, Signing Authorities, Acquisition/Disposal/Construction, Access Logs,
- Materials that document a financial decision or transaction
 - Invoices/Purchase Orders, Financial Ledgers, Receipt Batches, Petty Cash/
- Materials of historical or research importance
 - ADTs, Questionnaires
- Documents that result in a decision, or that result in the implementation of a policy or activity
 - Event planning, Emergency Management Plans, Program/Project Planning,
- Materials that would allow for the reconstruction of the evolution of policy and program decisions
- Materials that would be required to support a financial, administrative, or legal audit

Disposition: In consultation with a Health PEI RIM Coordinator, records are sent for destruction or storage according to retention schedules

WHAT IS A TRANSITORY RECORD?

Transitory records are created or received in various formats and hold short-term value.

Transitory records are only required for a limited time to complete a routine action, but do not have to be kept for legal, evidential, historical or financial purposes.

Examples:

- Working documents, such as drafts or preliminary materials, used in the preparation of a final document
- Copies kept for reference, including print-outs from an electronic system
- Memos, announcements, meeting requests
- Copies of minutes and agendas held by a committee member other than the chair
- Phone messages
- Handwritten notes that are transcribed into the official record by the writer

Disposition: Shred or delete once no longer useful

WHAT IS A NON-RECORD?

Non-records are created or received in various formats and do not provide evidence of a business activity or transaction and have no long-term value or confidential information.

Examples:

- Junk mail/spam/advertisements
- Materials available from public sources (books, journals, articles)
- Blank forms/obsolete stationary

Disposition: Immediately dispose of once no longer useful

Please contact healthpeiRIM@ihis.org for more information.