1.6 Documentation and Records Procedure

**Procedure**

The Documentation and Records Procedure is to be used in conjunction with the Volunteer and Staff Confidentiality and Privacy Policies and Procedures, and <Insert Organisation Name>’s Records Management, Documentation Change Control and Data Security Policies and Procedures.

All volunteers are to be briefed during induction regarding record-keeping and documentation requirements; supervisors will provide appropriate training, time and resources and monitoring of performance to ensure volunteers can satisfy <Insert Organisation Name>’s documentation and record-keeping requirements. At any time volunteers may seek clarification or advice regarding documentation and recording processes.

**Records Management**

All organisation records made by any staff member in the course of her or his duties are considered to be confidential and must not be divulged or released to unauthorised persons without authorisation from the <Insert Position>.

All organisation records must be appropriately protected at all times from unauthorised access, damage and loss. Where possible, all records storage areas are to be secure with access only provided to authorised personnel.

**Documentation Change Control**

<Insert Organisation Name> requires that all changes to organisation documentation (including additions and deletions) adhere to the organisation’s Documentation Change Control Procedure for the purposes of risk management and quality assurance. Volunteer staff may recommend changes to their supervisor; changes must not be made to final versions of documents but rather in a draft version. The <Insert Position> is responsible for authorising and approving documentation changes and may designate responsibilities to supervising staff.

**Data Security**

Access to organisation data will be based on what is necessary for volunteers to perform their work functions, and back-ups of data will occur as per <Insert Organisation Name>’s Data Security Policy and Procedure.

Laptop computers will only be taken off-site on a needs basis. When off-site, laptops will be kept securely and access restricted to the volunteer in question. Passwords for access to <Insert Organisation Name>’s server and relevant computer drives are provided to maintain security protocols; use of these passwords and access to business information are strictly controlled. Volunteers must adhere to all organisation protocols as outlined in the Data Security Procedure.

**Application**

This procedure applies to all volunteers; its application lies with the <Insert Position> and supervising staff.

**Standards**

1.2-1.4, 2.3, 3.3, 5.1-5.4, 6.1, 6.2, 8.1

**Related Policies and Procedures**

* Documentation and Records Policy
* Access to Personnel Records Procedure
* Risk Management Policy and Procedure
* Volunteer Induction and Orientation Policy and Procedure
* Volunteer Confidentiality and Privacy Policy and Procedure
* Volunteer Supervision Policy and Procedure
* <Insert Organisation Name> Data Security Policy and Procedure
* <Insert Organisation Name> Documentation Change Control Policy and Procedure
* <Insert Organisation Name> Records Management Policy and Procedure
* <Insert Organisation Name> Confidentiality and Privacy Policy and Procedure

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| Approved | CEO | Signature |  |
| Review | Annual | Next Review Date |  |