

OCDS Member Files and Local Council Records

This policy accompanies the Records Management Policy on the OCDS Provincial website.

Permanent Record Member Files

Communities are expected to use the electronic permanent record form (eRecord) currently provided by the Province.

The community's Records Manager (RM), under the direction of the local Council, keeps the electronic OCDS Central Office Permanent Records up to date. Members are responsible for notifying the RM regarding any changes to their information. It is recommended that the local Council keep paper copies as a backup. Normally, these would be kept by the Secretary, but may be kept by another designee of the Council.

Members are given a new copy of their permanent record whenever it is updated.

Council Records

It is vital to have backups in case of an accident. If documents are kept on Cloud storage, at least two persons should have the username and password and know how to manage the files.

Local Council records for individual members are kept in the following situations:

- The local Council keeps copies of any correspondence with members.
- The local Council keeps detailed documentation of circumstances that may lead to a member's dismissal. (Statutes IX).
- The Formation Director keeps detailed files for individuals in initial formation (up to the Definitive Promise). Discernment documents from the First Promise are kept to aid future Councils in discerning the Definitive Promise.

The local Council maintains the above files. They are open only to local Council members, the Provincial Visitor, and legitimate Superiors of the Order.

The following may be kept in paper or electronic format:

- Attendance records
- Permanent records of transferred, released, dismissed, and deceased members
- Records of ongoing contact with Infirm members

- Records of ongoing contact with Isolate members. (Statutes VIII.6)
- Meeting and Council minutes
- Financial records

See the Constitutions Articles 54 and 55 for Council Secretary and Treasurer duties regarding recordkeeping.

All files and records are handed over to the new Council after elections. (Statutes XVI.8)

Purging Files

It is vital to protect the privacy of the members and the confidentiality of the local Council's records. Local Councils do not keep permanent copies of definitively professed members' homework, self-evaluations, periodic reviews, or anything else of a personal and private nature. Except in unusual circumstances, local Councils should not keep anything in the files of definitively professed members, except a copy of the Permanent Record.

After a leave of absence, and once the member is attending meetings again, any correspondence from the person may be returned to him or her. Other documents are removed.

If a definitively professed member decides to leave the Order, he or she normally signs at the appropriate place on the permanent record. If the person requests a release of the Promise by letter or email, this is archived with the updated permanent record. No other documents are kept.

All documentation surrounding a dismissal is sealed and kept in case the Provincial Superior asks to see it. This is not to be opened by subsequent Councils. The permanent record is archived.

In the case of previously archived files of members who are no longer with the community, there is no need for the local Council to attempt to return the personal documents. They may be destroyed along with the other documents, with the exceptions noted above.

Important: The OCDS Central Office Permanent Record is never destroyed.

Discernment Documents

Discernment documents from the First Promise are kept to aid future Councils in discerning for the Definitive Promise.

After the Definitive Promise, the documents written by the member are returned. All other discernment documents are destroyed.

This statement supersedes all previous statements on OCDS Member Files.
The online document is the only one to be considered official.
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For persons who the Council discerns not to have a vocation, the documents written by the member may be returned or destroyed. The other documents are destroyed, and the updated permanent record is archived.

If a person leaves the Order voluntarily before the Definitive Promise, refer to Statues VIII.9 and the Provincial readmission norms on the website. In anticipation of possible readmission, the Formation Director may keep the person's discernment documents for a reasonable period of time as determined by the local Council, after which the documents are destroyed. The permanent record is archived.

A Non-Binding Recommendation

It is good practice for individual council members to keep phone logs and copies of private correspondence for their own personal records. Council members normally keep personal copies of community and council meeting minutes for reference.

All members are encouraged to keep copies of any documents they submit to the Council or their formators.