CSR 20

HEALTH AND FITNESS

RECORDS CLASSIFICATION PLAN AND RETENTION SCHEDULE

URIMC Approved:
May 12, 2016
URIMC Revised:
N/A
RIM Edits (consistency, typographical, updates, etc.):
November 15, 2016 and March 2, 2017

Contact the Records and Information Management Program (Archives and Special Collections, University Library) for more information: https://www.uregina.ca/library/rim/
CSR 20 HEALTH AND FITNESS

FUNCTIONAL GROUPING DESCRIPTION

This functional grouping includes records promoting and assessing the health and fitness of employees of the University and participating governments, companies, organizations and individual community users.

CSR 20 FUNCTIONS LIST

100 Occupational and Athletic Testing
200 Rehabilitation and Therapy
300 Training and 3rd Party Projects
CSR 20 HEALTH AND FITNESS

FUNCTION 100 – OCCUPATIONAL AND ATHLETIC TESTING

FUNCTION DESCRIPTION

The function of establishing testing and assessing the fitness of employees or potential employees of the University as well as government and private agencies (police services, firefighters, highway traffic officers, athletic teams, etc.) in accordance with contractual arrangements. Records created as part of this function may include criteria against which candidates are measured and questionnaires, assessments and analysis of participating individuals.

Reasonable security arrangements will be made for records containing personal information in order to protect these records from unauthorized access, collection, use, disclosure or disposal.

<table>
<thead>
<tr>
<th>Series Number</th>
<th>Series Name</th>
<th>OPR</th>
<th>Official Record Location</th>
<th>Official Record Retention*</th>
<th>Other Copies Retention</th>
<th>Specialized Electronic System</th>
<th>Disposition Guidelines and Related Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSR20-100-10</td>
<td>Case Files</td>
<td>DPSC</td>
<td>DPSC</td>
<td>In absence of contract which includes provision requiring U of R return to agency or prescribed destruction, 7 years</td>
<td>In absence of contract which includes provision requiring U of R return to agency or prescribed destruction, 7 years</td>
<td>Testing devices</td>
<td>Where contract requires return to agency, return immediately. Guided by HIPPA, records that contain personal health information need to be securely destroyed (if paper) or rendered permanently inaccessible (if electronic).</td>
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Case Files
Occupational Testing and Athletic team fitness testing consents, results and assessments. These files contain individual information, filed together in a group. May include personal health information.

DPSC
In absence of contract which includes provision requiring U of R return to agency or prescribed destruction, 7 years
7 years

Testing devices
Where contract requires return to agency, return immediately.

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OPR – Office of Primary Responsibility. Contact your area’s Designated Records Officer for details on OPRs listed as “Various”.

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<tr>
<td>CSR20-100-20</td>
<td><strong>Contracting Party Files</strong></td>
<td>DPSC</td>
<td>DPSC</td>
<td>Completion of contract + 3 years</td>
<td>N/A</td>
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FUNCTION 200 – REHABILITATION AND THERAPY

FUNCTION DESCRIPTION

The function of the rehabilitation of people with chronic diseases, cardiovascular conditions, risk factors and the development of exercise therapy programs tailored to the needs of individual clients. Records created as part of this function may include chronic disease, cardiac, risk reduction, third party payer exercise therapy files, personal training, individual athlete files, health and fitness assessments, etc.

Reasonable security arrangements will be made for records containing personal information in order to protect these records from unauthorized access, collection, use, disclosure or disposal.

See HRM50-700 for additional staff health and wellness records.

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<tr>
<td>CSR20-200-10</td>
<td>Rehabilitation Case Files</td>
<td>DPSC</td>
<td>DPSC</td>
<td>7 years</td>
<td>N/A</td>
<td></td>
<td>Where contract requires return to agency, return immediately. Guided by HIPPA, records that contain personal health information need to be securely destroyed (if paper) or rendered permanently inaccessible (if electronic).</td>
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Files of individual clients participating in the programs. Includes personal health information, intake forms, and outcomes data.

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<td>CSR20-200-20</td>
<td><strong>Contracting Party Files</strong></td>
<td>DPSC</td>
<td>DPSC</td>
<td>Completion of contract + 3 years</td>
<td>N/A</td>
<td></td>
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<tr>
<td></td>
<td>Measurement criteria and correspondence with the sponsor (i.e. provincial government). File contracts and agreements in EAG40-100-10.</td>
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<tr>
<td>CSR20-200-30</td>
<td><strong>Exercise Therapy/Training/Assessment Case Files</strong></td>
<td>DPSC</td>
<td>DPSC</td>
<td>7 years</td>
<td>N/A</td>
<td>Testing devices</td>
<td></td>
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<tr>
<td></td>
<td>Files of individual clients participating in the program. This includes third party payer files. Files include personal health information.</td>
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FUNCTION 300 – TRAINING AND 3RD PARTY PROJECTS

FUNCTION DESCRIPTION

The function of providing training programs such as Red Cross CPR Training, Saskatchewan Environment Occupational Health Screens, etc.

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<tr>
<td>CSR20-300-10</td>
<td>Case Files</td>
<td>DPSC</td>
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<td>N/A</td>
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<td></td>
<td><strong>Contracting Party Files</strong></td>
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<td>DPSC</td>
<td>Completion of contract + 3 years</td>
<td>N/A</td>
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<tr>
<td></td>
<td>Program requirements and correspondence with the body requesting the training.</td>
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<td><strong>File contracts and agreements in EAG40-100-10.</strong></td>
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