



**MRFA**  
MOUNT ROYAL  
FACULTY ASSOCIATION

## Document Management Policy

**Category:** Operational Policy  
**Date Created:** October 2015  
**Review Cycle:** *Last revision: 2024 Next Revision: 2027*  
**Policy Sponsor:** Communications Officer

### I. Overview

The MRFA maintains three primary digital repositories for all MRFA documentation. Mobilis is used to file all membership data and grievance records, Filehold is used to store all other Association records, and Gmail and Mailchimp are used to manage distribution lists, to communicate with members, and to assess effectiveness of communications.

### II. System Management and Access

- i. The Senior Administrative and Faculty Relations Officer is responsible for maintaining the systems, user accounts and access restrictions.
- ii. Officers and Staff with accounts on Filehold shall include but not be limited to the President, Senior Grievance and Workplace Wellness Officer, Senior Administrative and Faculty Relations Officer, Labour Relations Officer, Administrative Specialist, and Faculty Centre Coordinator.
  - a. Additional accounts may be created as approved by the Executive Board.
  - b. Access for each account will be restricted to those areas of Filehold which are relevant to the individual(s) position.
- iii. Officers and Staff with accounts on Mobilis shall be limited to the President, Senior Grievance and Workplace Wellness Officer, Senior Administrative and Faculty Relations Officer, Labour Relations Officer, Administrative Specialist, and Assistant Grievance Officers.
- iv. Officers, Staff, and members with accounts on Mailchimp shall include the Communications Officer, Senior Administrative and Faculty Relations Officer, Administrative Specialist, and members selected from and by the Communications Committee. Additional accounts may be created with the approval of the Executive Board.
- v. Officers and Staff with MRFA.net Gmail Suite Accounts shall include but not be limited to the following list. All correspondence sent to these email addresses shall be kept confidential in accordance with the Association's Confidentiality and Grievance policies.
  - Staff Email Accounts:
    - Sr. Admin. and Faculty Relations Officer: [FacultyRelations@mrfa.net](mailto:FacultyRelations@mrfa.net)
    - Labour Relations Officer: [LabourRelations@mrfa.net](mailto:LabourRelations@mrfa.net)
    - Faculty Centre Coordinator: [FacultyCentre@mrfa.net](mailto:FacultyCentre@mrfa.net)
    - Administrative Specialist: [office@mrfa.net](mailto:office@mrfa.net)

- Officer's Email Accounts:
  - Academic Policy and Governance Officer: PolicyandGovernance@mrfa.net
  - Advocacy Officer: advocacy@mrfa.net
  - Communications Officer: communications@mrfa.net
  - Contract Member Representative: ContractMemberOfficer@mrfa.net
  - EDI Officer: EDI@mrfa.net
  - Finance Officer: finance@mrfa.net
  - Member Engagement and Services Officer: memberengagement@mrfa.net
  - Negotiations Officer: negotiations@mrfa.net
  - President: president@mrfa.net
  - Senior Grievance and Workplace Wellness Officer: GrievanceOfficer@mrfa.net
- Collective Bargaining CaucusMembers (with email addresses to match their mtroyal.ca usernames)

### **III. Data Filing**

To ensure consistency in document filing the Association's Administrative Specialist shall be responsible for uploading documents to Filehold and the Labour Relations Officer shall be responsible for uploading grievance related documents to Mobilis. Other Staff and Officers may forward documents to the AS or LRO as appropriate, or, those with access to these systems, are permitted to upload files; however, the following conventions must be maintained:

- i. File naming should be standard and consistent with other files in the same location. This shall usually be: Document date – Document type – Document details (e.g. 2020-09-28 – Minutes – Executive Board)
- ii. Grievance numbering and metadata tracking should be consistent. The Senior Grievance and Workplace Wellness Officer should consult with the LRO when accessing or filing data in Mobilis.
- iii. Official email records should be uploaded when time permits or copied to the appropriate staff member. Due to time constraints not all email records can be filed but the following records will be prioritized:
  - all email correspondence relating to member representation of any kind, with grievance related emailed being added to Mobilis and/or Filehold and all others added to Filehold,
  - all email correspondence with Senior Administrators, and
  - all email correspondence with the Association's legal counsel.

#### **IV. Record Retention**

As time permits, existing paper-based records shall be imported into the appropriate digital filing system by the Administrative Specialist (Filehold) and/or the Labour Relations Officer (Mobilis).

Digital records shall be maintained indefinitely or until such time as space capacity is exceeded necessitating a review of retention practices.

Notes taken by staff at MRFA meetings, other than the confidential notes from Executive Board Meetings, shall be destroyed upon termination of employment. Notes shall not attribute to individuals comments made in meetings.

#### **V. Data Security and Confidentiality**

Both Filehold and Mobilis are hosted on servers in Canada with regular backups and are accessible by Association Officers and Staff offsite. The Association's Gmail suite is entirely independent of the University's Gmail Suite and is administered by the Senior Administrative and Faculty Relations Officer. The Association does not maintain paper-based records.

#### **VI. Personal Information and Privacy**

The Association collects personal information of its members, in accordance with the Personal Information Protection Act and the Collective Agreement. This information is stored on protected servers, as outlined in section V of this policy. The information collected is used to ensure continuing member services and is password protected. The Association Administrative Specialist is responsible for maintaining the personal information of members.

#### **VII. Related Policy**

- Confidentiality
- Grievance Policy
- Communications Policy (email communications and distribution lists)