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Agenda Item: 11

Integration Joint Board

Date of Meeting: 22 March 2022.

Subject: Records Management Plan.

1. Purpose

1.1. To update Members on progress in implementing the Integration Joint Board's Records Management Plan (the "Plan").

2. Recommendations

The Integration Joint Board is invited to note:

2.1. That the current Records Management Plan, approved by the Board in November 2020, was approved by the Keeper of the Records of Scotland on 5 February 2021.

2.2. That, following review, a small number of revisals are proposed, primarily in order to reflect changes in personnel and job titles.

2.3. Progress to date in implementing the Plan, as detailed in section 4 of this report.

2.4. That progress on implementation of the Plan will continue to be brought to the Board every two years unless there are any proposed changes requiring approval in the interim.

It is recommended:

2.5. That the revisals shown tracked in the Records Management Plan are approved for submission to the Keeper of the Records of Scotland.

3. Background

3.1. The Public Records (Scotland) Act 2011 obliges the Integration Joint Board (IJB), and other public authorities, to prepare and implement a Records Management Plan. The Plan sets out proper arrangements for the management of records.

3.2. The IJB's current Plan was approved by the Keeper of the Records of Scotland on 5 February 2021. However, three elements of the Plan were approved on the 'Improvement Model' terms and the Keeper requires further work to be undertaken as described in section 4 and within Appendix 2.

3.3. The Plan was adopted by the IJB in November 2020 and is now due to be reviewed. The Plan has been reviewed by the Chief Officer, the Chief Finance Officer and the Data Protection Officer of the IJB, and by the Senior Committees Officer, the Information Governance Officer and the Data Protection Officer of Orkney Islands Council (OIC). A small number of changes are proposed and these are shown tracked on pages 4, 5, 8 and 12 of the Plan. These changes address previous typographical errors, reflect recent changes in personnel and job titles and confirm the place of publication of the IJB's Records Management Policy.

3.4. Progress on implementation of the Plan will continue to be brought to the IJB every two years unless there are any proposed changes requiring approval in the interim.

4. Implementation of the Plan

4.1. The Plan was approved by the Keeper of the Records of Scotland. However, three elements of the Plan were approved on the 'Improvement Model' terms and the Keeper required further work to be undertaken and the response is as follows:

4.1.1. **Element Four: Business Classification.** IJB records are held on the Council's systems and Business Classification is being addressed by the Council's Electronic Document and Records Management Project, which is ongoing.

4.1.2. **Element Six: Destruction Arrangements.** The Keeper's Assessment of the Plan, as at Appendix 2, noted:

"All IJB Records are held on Orkney Islands Council's system and therefore the destruction of hard-copy and digital records is carried out in accordance with Council policies. However, the Plan of Orkney Islands Council has been agreed by the Keeper under the 'improvement model' terms for Element 6."

4.1.2.1. The Council has made significant progress with Destruction Arrangements with an industrial shredder in place, Procedures in place for the transfer of paper records due for destruction in place, and the Council has now destroyed the backlog of back-up tapes. The matter that remains outstanding is the destruction of digital records which is being addressed by the Council's Electronic Document and Records Management Project, which is ongoing.

4.1.3. **Element Eleven: Audit Trail.** IJB records are held on the Council's systems and the Audit Trail for records is being addressed by the Council's Electronic Document and Records Management Project, which is ongoing.

5. Contribution to quality

Please indicate which of the Orkney Community Plan 2021 to 2023 visions are supported in this report adding Yes or No to the relevant area(s):

Resilience: To support and promote our strong communities.	Yes.
Enterprise: To tackle crosscutting issues such as digital connectivity, transport, housing and fuel poverty.	No.
Equality: To encourage services to provide equal opportunities for everyone.	No.
Fairness: To make sure socio-economic and social factors are balanced.	No.
Innovation: To overcome issues more effectively through partnership working.	Yes.
Leadership: To involve partners such as community councils, community groups, voluntary groups and individuals in the process.	No.
Sustainability: To make sure economic and environmental factors are balanced.	No.

6. Resource and financial implications

6.1. There are no resource or financial implications directly arising from this report.

7. Risk and equality implications

7.1. There are no risk or equality implications directly arising from this report.

8. Direction required

Please indicate if this report requires a direction to be passed to:

NHS Orkney.	No.
Orkney Islands Council.	No.

9. Escalation required

Please indicate if this report requires escalated to:

NHS Orkney.	No.
Orkney Islands Council.	No.

10. Authors and contact information

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11. Supporting documents

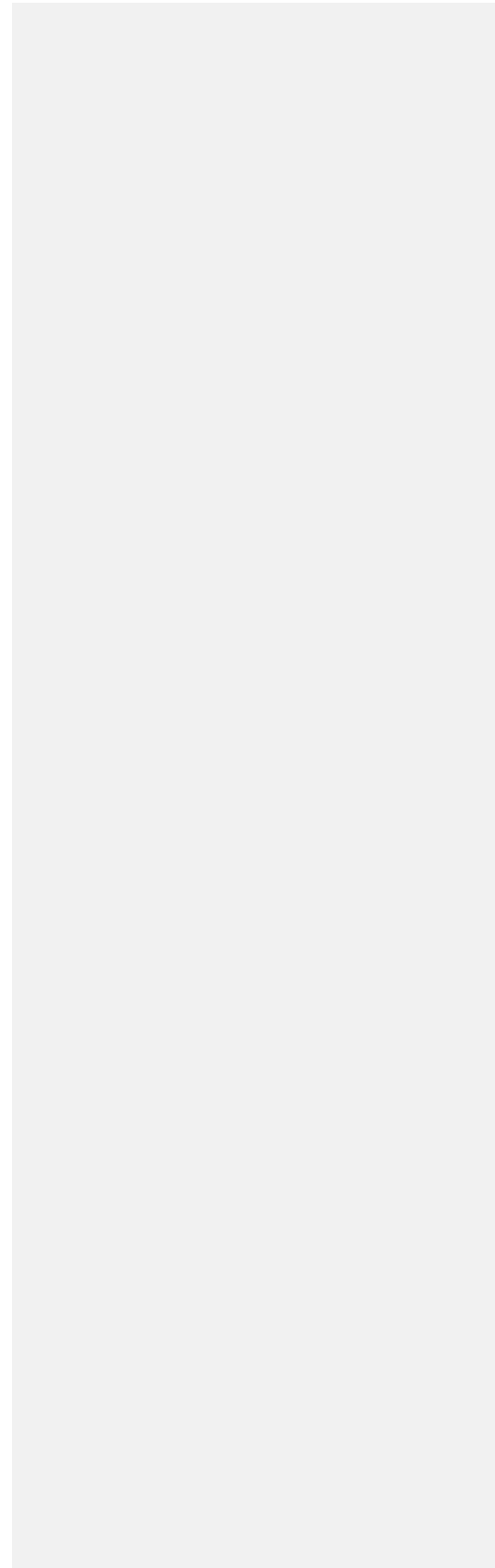
11.1. Appendix 1: Records Management Plan.

11.2. Appendix 2: Keeper of the Records of Scotland's Assessment of Orkney IJB's Plan.



Records Management Plan

Integration Joint Board



Document Control

Title.	Records Management Plan.
Prepared By.	George Vickers, Information Governance Officer.
Authorised for IJB consideration	Gillian Morrison, Interim Chief Officer 17.11.2020
Approved Internally By.	Orkney Integration Joint Board.
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Foreword

This is the Records Management Plan for the Orkney Integration Joint Board (the "Board"). It has been prepared in compliance with the requirements of the Public Records (Scotland) Act 2011.

The Board takes its responsibilities for records management very seriously. Our records and archives will provide materials for the historians of the future. The Board will protect and manage information like any other asset that we are entrusted with.

The Board expects that this Records Management Plan will provide a firm foundation from which we can make better use of this information. It will help make sure:

- That our officers and Board members have the right information to hand to support their activities and decisions.
- That information is freely available when required or securely protected if that information is personal or sensitive and therefore only available to those who need it.
- That the Plan is accurate, reliable and up to date.
- That we do not waste valuable resources storing information which is no longer required, is superseded, or is duplicated elsewhere.

All this must be done against our obligations to safeguard the historical and archival memory of Orkney.

The Plan also recognises that we are on a journey. Many of the elements within the Plan describe the future developments which will improve our records management policies and procedures.

I commend this Plan to the Keeper of the Records of Scotland and the people of Orkney.

Stephen Brown
Chief Officer

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Introduction

The Public Records (Scotland) Act 2011 (hereafter referred to as "the Act"), came fully into force in January 2013. The Act obliges the Board and other public authorities to prepare and implement a records management plan (RMP). The RMP sets out proper arrangements for the management of records. The plan is agreed with the Keeper of the Records of Scotland (the Keeper) and reviewed by the Board on an annual basis.

The Board's Records Management Plan is based on the Keeper's published Model Records Plan. The plan has 15 Elements:

01. Senior management responsibility.
02. Records manager responsibility.
03. Records management policy statement.
04. Business classification.
05. Retention schedules.
06. Destruction arrangements.
07. Archiving and transfer arrangements.
08. Information security.
09. Data protection.
10. Business continuity and vital records.
11. Audit trail.
12. Competency framework for records management staff.
13. Assessment and review.
14. Shared Information.
15. Public records created or held by third parties.

The Board has provided the Keeper with evidence of policies, procedures, guidance and operational activity on all elements of the Plan.

The Plan was agreed with the Keeper on 5 February 2021 and will be reviewed in December 2021.

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The Board's RMP relates to records throughout their lifecycle, from creation and acquisition to archive and destruction.

For more information about the Public Records (Scotland) Act 2011, visit the website of the [National Records of Scotland](#).

A copy of the Act can be viewed online via [The National Archives](#) website.

About Integration Joint Boards

The integration of health and social care is part of the Scottish Government's programme of reform to improve care and support for those who use health and social care services. It is one of the Scottish Government's top priorities.

The Public Bodies (Joint Working) (Scotland) Act 2014 provides the legislative framework for the integration of health and social care services in Scotland.

It has put in place:

- Nationally agreed outcomes, which apply across health and social care, in service planning by Integration Joint Boards and service delivery by NHS Boards and Local Authorities.
- A requirement on NHS Boards and Local Authorities to integrate health and social care budgets.
- A requirement on Partnerships to strengthen the role of clinicians and care professionals, along with the third and independent sectors, in the planning and delivery of services.

Records Management in the Board

The records of the Board constitute an auditable account of the authority's activities, which provides evidence of the business, actions, decisions and resulting policies formed by the Board.

Records represent a vital asset, which support the functions of the Board. Effective record keeping supports efficiency, consistency and continuity of work. It ensures that the correct information is captured, stored, maintained, retrieved and destroyed or preserved in accordance with business need, statutory and legislative requirements.

Records management is an essential part of enabling the Board to achieve priority outcomes that reflect what is most important to the people and communities of Orkney, as set out in the Board's [Strategic Plan](#) available on the Board's website. The Board maintains a [Records Management Policy](#) and procedures and practices across all its service areas. These are based upon the requirements of the Public Records (Scotland) Act 2011, records management best practice and the principles detailed below.

Records Management Principles

The following principles drive activities relating to records management:

- Records are a valuable resource and must be managed as such.
- Records are maintained in accordance with legislation.
- Records are stored within record keeping systems, rather than in personal filing.
- Records are shared and not duplicated.
- Records are stored in a consistent manner that reflects the Board's functions.
- Records are appropriately secured.
- Records are easily accessible for as long as they are required.
- Records that are identified as vital are protected.
- Records that are identified as of historical significance are preserved.
- Records are disposed of in accordance with approved Records Retention Schedules.

- Records management procedures are understood by all staff and staff are appropriately trained.
- Records management is a responsibility of all staff.
- Records management practices adhere to the Board's policy, procedures and standards.
- Records keeping systems are compliant with the requirements to manage records throughout their lifecycle.
- Records management practices will support the Board's values.

Records covered by this plan

In line with the Act, all records created in the carrying out of the Board's functions (whether directly or by third parties) are public records. Part 1, section 3.1 of the Act states that:

"... "public records", in relation to an authority means –

- (a). Records created by or on behalf of the authority in carrying out its functions.
- (b). Records created by or on behalf of a contractor in carrying out the authority's functions.
- (c). Records created by any other person that have come into the possession of the authority or a contractor in carrying out the authority's functions."

Records Management Systems and the Board

The Board uses four main types of records management systems:

- Manual filing systems.
- IT applications and databases (that process records for specific functions e.g. HR, Purchasing, Housing Management etc.).
- Corporate Electronic Documents and Records Management System (EDRMs).
- Electronic documents stored on a shared drive using Windows Folders.

All records management systems are subject to records management policy, procedures, guidelines and elements of this Plan.

The 15 elements of the Board's Records Management Plan

01: Senior Management Responsibility

Senior Management responsibility for the Records Management Plan lies with the Chief Officer for the Board.

Responsibility for providing advice on data protection and advising on and monitoring compliance with data protection laws, lies with the Board's Data Protection Officer and Head of Legal Services for Orkney Islands Council.

For enquiries relating to the Records Management Plan, please contact:

Chief Officer.

Orkney Health and Care, School Place, Kirkwall, Orkney, KW15 1NY.

Telephone: 01856873535, email: ohacfeedback@orkney.gov.uk.

02: Operational Records Management Responsibility

The point of contact for the operation of records management within the Board is the Council's Information Governance Officer.

For enquiries relating to Records Management, please contact:

Information Governance Officer

Orkney Islands Council, School Place, Kirkwall, Orkney, KW15 1NY.

Telephone: 01856873535, email: OHACfeedback@orkney.gov.uk.

03: Records Management Policy Statement

The Board's commitment to effective records management is set out in its Records Management Policy published on the [website of Orkney Islands Council](#) and is subject to ongoing monitoring and annual review.

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Online guidelines and procedures are available to staff. This is supported by online training and ready access to the Information Governance Officer for advice.

The Board uses a series of different systems that manage documents and records, such as folders on the secure G Drive within the Council, and these systems will be reviewed and, where necessary, plans put in place to ensure that the systems apply the Board's Records Management policies.

04: Business Classification

The Board uses the Scottish Council on Archives Records Retention Schedule (SCARRS) as the basis of its Business Classification Scheme.

The Board recognises the importance and benefits of organising its information in such a way that facilitates business efficiency and information management and has developed a business classification scheme covering all functions of the Board.

- Governance documents.

- Equalities.
- Human resources.
- Appointment of members of the Board.
- Finance.
- Management and Administration.
- Policies and Procedures.
- Strategic Planning.
- Oversight of Services.

The Business Classification Scheme is developed in a structure that supports the business activities of the Board. The Board is structured in three tiers:

- Level 1: functions.
- Level 2: activities.
- Level 3: transactions.

The Board has combined its Business Classification Scheme and Records Retention and Disposal Schedule.

Some records and documents are held in personal drives and personal email accounts which makes them effectively inaccessible to other officers and means that they are not effectively managed by the Board. To help manage the amount of information held in shared drives and email accounts, the Council's EDRMS (Electronic Document and Records Management System) Project will, once implemented, make SharePoint available as a repository for records and introduce new procedures, including the automatic deletion of emails for most accounts after a period.

The deployment of EDRMS in the Council will require that file plans are developed to accommodate strict security models, whilst facilitating information sharing, and the application of retention scheduling.

05: Retention Schedules

The Board has developed a Retention and Disposal Schedule with records organised according to the Business Classification Scheme (element 04). The Schedule also lists those Vital Records that would be required for ensuring that the Board can implement its Business Continuity Plans.

The Retention and Disposal Schedule covers all the Board's records and draws together into a single reference document all existing statutory, regulatory and best practice retention and disposal arrangements. The Board has adapted the Scottish Council for Archives records retention schedule model (SCARRS) as the basis for its Retention and Disposal Schedule and has mapped its schedule to its Business Classification Scheme. The Retention and Disposal Schedule applies to both electronic records and paper records.

Requests for changes to the Schedule should be made to the Chief Finance Officer who maintains the Schedule.

The Schedule is located on the Records Management Policy page of the Board's website.

Non-current operational records are stored in the main offices of the Board, and there will be no requirement to find alternative long term storage within the five year lifetime of this Records Management Plan and well into the lifetime of any subsequent Plan. The Orkney Library and Archive service provides a service for the preservation of historical records. This resource manages the retention and disposal of these records and works with the Board to identify records for archival, preservation or destruction.

Standards for records retention are built into any contracts and agreements with third parties who share or process information on the Board's behalf.

06: Destruction Arrangements

The Board recognises that a disposal policy secures the position of the Board and helps every member of staff in their day-to-day work.

The Board has procedures for the disposal of records. The procedures require disposals to be:

- Authorised.
- Appropriate.
- Secure and confidential.
- Timely.
- Documented.

Destruction of highly sensitive hard-copy records will be supervised by an appropriate officer.

Disposals of hard drives will be disposed of securely by the Orkney Islands Council IT Service in accordance with the Council's Information Security Policy.

Data in other electronic business systems will be deleted in such a way that prevents reconstruction.

07: Archiving and Transfer Arrangements

Orkney Library and Archive provides facilities for the preservation of historical records.

The official records of the Board will form a part of Orkney Archive. Archiving and transfer arrangements are detailed within the County's Archive "Procedure for Appraising which Records should be Transferred to the Archive Service" and within the IJB's approved records retention schedules.

The Senior County Archivist is responsible for deciding which records are to be kept permanently after liaising with the appropriate service areas. The Orkney Archive Service has adopted clear principles approved to help ensure that records which

document the principal actions of the Board and its officials, the rights of the islanders and the community experience are identified and preserved.

Records identified in the Retention and Disposal Schedule as being suitable for permanent preservation will be transferred from the Board's Records Store to Orkney Archive. Transfer is undertaken using Council employees directed by the Board, using Council vehicles.

Records received in Orkney Archive are documented on an Accession Receipt Form prior to entry in the Archive catalogue.

08: Information Security

All Board records are held on IT systems provided by Orkney Islands Council or, in the case of paper records, stored on Council premises. All staff who manage and have access to Board records are employees of the Council. The Board has therefore decided that it is appropriate to adopt and follow the Council's Policy and Procedures. The Board's staff, the Chief Officer, employed by NHS Orkney, and the Chief Finance Officer, employed by Orkney Islands Council, are already required by their employment contracts to comply with their respective employer's Information Security Policy, guidance and procedures.

Orkney Islands Council's Information Security Policy is a high-level document which sets out the Council's strategic direction regarding information security.

The Policy is based on the 7 principles of information security listed below:

1. Data Protection – Ensuring data is protected.
2. Relevance and Consistency – Ensuring the controls in place to ensure information security are relevant to the risk, proportionate and applied consistently across the organisation.
3. Security is an Enabler – Viewing information security as a means of assisting rather than hindering the business strategy.
4. The Right Access – Employees require the right access to effectively do their job coupled with the principle of least privilege, but how can we share information securely to improve efficiencies and effectiveness.
5. Plan for the Unexpected – Regardless of vigilance vulnerabilities will emerge as new attacks occur, and malware mutate. Orkney Islands Council must anticipate this and be prepared.
6. Security for the Whole Lifecycle – Security should be considered from the start of a project and not bolted on later.
7. Accountability – It must be possible to hold authorised users of information accountable for their actions.

To ensure effective implementation in practice, this policy is underpinned by guidelines. The Corporate Information Security Staff Guidance booklet, published by Orkney Islands Council, gives advice on information security, use of the internet at work, email and mobile devices. It also provides guidance on taking information out of the workplace, using IT equipment at home and what to do if something goes wrong. It also explains how ICT facilities may be used and the conditions in place

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relating to individual use. This booklet is provided to all staff who manage or have access to Board records and staff are instructed to follow this guidance.

All staff who manage or have access to Board records are required to complete an online Information Security course written by the Council's Information Security Officer.

Governance

The Council's Interim Head of Property, IT and Facilities champions information security and provides strategic leadership and reports to the Council's Senior Management Team (SMT). The Board's Chief Officer is a member of this SMT. Professional advice and guidance is provided by the Council's Information Security Officer.

The Council's Corporate Leadership Team sets the strategic direction in relation to information security and ensures resources for implementation. The fact that Information Security is represented at board level demonstrates its level of importance to Orkney Islands Council.

Deleted: Senior Management

Orkney Islands Council has engaged the services of a CLAS consultant to advise on matters of infrastructure and operational security. A CESG CHECK compliant organisation is used to provide independent IT Health Checks to ensure that systems are compliant.

CESG is the Communications Electronic Security Group.

CLAS is the CESG Listed Advisor Scheme.

CHECK is an assurance scheme for security testers managed by the CESG.

09: Data Protection

Data Protection legislation is enforced and promoted by the Information Commissioner, who provides guidance and advice on complying with the terms of Data Protection legislation and investigates complaints regarding possible breaches of the obligations contained within this legislation.

The Information Commissioner maintains a register of Notifications listing all Data Controllers in the UK. Data Controllers are required to register the types of personal data processed by them, the purposes of that processing and the third parties with whom the personal data may be shared. The Board is registered with the Information Commissioner's Office as a data controller and its registration number is ZA207653.

The Board has appointed the Council's Head of Legal Services, as its Data Protection Officer.

The Board does not handle any personal information relating to service users or patients that has not already been pseudonymised or anonymised. The only personal data handled by the Board relates to its two members of staff, the Chief Officer and the Chief Finance Officer, who are employees of Orkney Islands Council and members of the Board. Because the only special category information that the

Board is likely to handle relates to members of staff who are employees of the Council, the Board has decided to adopt and follow the Council's Data Protection Policy and Data Protection Procedure. As employees of the Council, the Board's staff are already required by their employment contracts to comply with the Council's Data Protection Policy and Procedure.

The Data Protection legislation regulates the processing of personal data by the Board. The General Data Protection Regulation (the 'Regulation') and the Data Protection Act 2018 give individuals rights which are:

- The right to be informed about how their information will be used.
- The right of access to their personal information.
- The right to rectification, which is the right to require the Board to correct any inaccuracies.
- The right to request the erasure of any personal information held by the Board where the Board no longer has a basis to hold the information.
- The right to request that the processing of their information is restricted.
- The right to data portability.
- The right to object to the Board processing their personal information.
- Rights in relation to automated decision making and profiling.

The General Data Protection Regulation sets out 6 data protection principles which must be complied with when the Council is processing personal data. The 6 principles require that personal data is:

1. Processed lawfully, fairly and in a transparent manner in relation to individuals.
2. Collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
3. Adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed.
4. Accurate and, where necessary, kept up to date.
5. Kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed.
6. Processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures.

The Council's Data Protection Policy and Data Protection Procedures set out the responsibilities of members of staff.

The Council has a Data Protection Policy to ensure that the Council complies with the requirements of the Data Protection legislation. The Policy will be regularly reviewed. In addition, the Council has developed Data Protection Procedures and Guidance for officers to ensure compliance with the responsibilities of the Council when processing personal data. This includes policies and procedures for the use of mobile electronic devices, the use of Council email and internet systems, the

application of passwords to electronic information, the disposal of IT hardware and a general records management policy.

All staff employed within Orkney Health and Care, who manage or have access to Board records, are required to undertake data protection training to ensure that personal data is processed in accordance with the data protection principles. This training will be refreshed annually and is reinforced through the year with ongoing guidance provided by the Council and NHS Orkney to staff employed within Orkney Health and Care.

10: Business Continuity and Vital Records

The Vital Records are those records which the IJB and services will need to implement their Business Continuity Plans. The IJB's vital records are set out in the IJB's Retention and Disposal Schedule.

The Business Continuity Plan serves as the main resource for the preparation for, response to, and recovery from, an emergency that might affect any number of crucial functions in an authority.

The IJB's records are managed by the Council and are subject to the policies and procedures of the partner body in relation to business continuity. Business Continuity Plans for the Council services responsible for the IJB's records, are in place.

All services will continue to be provided or commissioned directly by NHS Orkney or Orkney Islands Council. As such there is no direct current requirement for the IJB to have its own arrangements for business continuity of vital records held by these services. Both NHS Orkney and Orkney Islands Council have adequate business continuity arrangements to ensure the sustainability of health and social care services for which the IJB has overall responsibility.

11: Audit Trail

An audit trail is a sequence of steps documenting the movement and/or editing of a record resulting from activities by individuals, systems or other entities.

Control sheets are attached to IJB policies and procedures so it is possible to identify which is the current version, what changes may have been made to the policies and procedures and when.

The IJB's records are created by Orkney Islands Council, often with data supplied by the Council or NHS Orkney, and are managed via Orkney Islands Council's IT system. The records are held in windows folders on the secure G drive within the Council. This works well for the relatively small number of records that the IJB has created.

The Council is moving to an Electronic and Document Records Management System using Office365/SharePoint and the IJB will move to this system which will be better for managing larger numbers of records and capturing an audit trail.

12: Competency Framework for Records Management Staff

The staff responsible for managing IJB records, the Chief Officer, the Chief Finance Officer and the Council's Senior Committees Officer, have all completed the training prepared by the Council for Records Management, Data Protection and Information Security.

The IJB is supported by the Information Governance who is fully trained on Records Management and Information Governance.

13: Assessment and Review

The IJB relies on the partner authority to ensure that the systems, policies and procedures that govern its records are being regularly assessed.

This Records Management Plan will be reviewed and updated through the Orkney Health and Care Senior Management Team. During the first year any gaps in this Plan will be identified as issues arise and solutions agreed.

14: Shared Information

Under certain conditions, information given in confidence may be shared. Most commonly this relates to information which is not confidential and any personal information will have been anonymised or pseudonymised. However, confidential corporate records may be shared with the Council, NHS Orkney, the Scottish Government and others where there are legal requirements to do so.

No personal data or confidential data is routinely shared by the IJB. The only information that the IJB routinely shares is information that it publishes and is available to the general public.

Where personal data is shared on a regular basis by the bodies contracted by the IJB to provide services, the Council and the Health Board, with the IJB, a Data Processing Agreement will be put in place.

The IJB will not share personal information, other than that relating to the staff employed to support the IJB, the Chief Officer and the Chief Finance Officer. This information will be managed according to the Council's Data Protection and Information Security policies.

The IJB Publication Scheme identifies information which is available under the Freedom of Information (Scotland) Act 2002 (FOISA).

15: Public Records Created or Held by Third Parties

No third party carries out an IJB function on its behalf.