

Ruby Ranch Homeowners Association Data Retention Policy

All written records of the RRHOA will be converted to PDF documents and stored on the Association's website in a secure, password protected area. Some examples of written records are monthly recurring bills, deposit records (copies of checks), bank statements, tax statements and returns, W-9 info, resale certificates, general legal opinions, etc. Any written record greater than 10 pages shall not require scanning into PDF but must be stored with other existing Association paper records. Examples of greater than 10-page record might be the Association's insurance policy, legal documents, ACC-related home plans, etc.

Some other important Association documents, such as Meeting Minutes, Monthly Financial Summaries, etc, will be stored and available on the publicly accessible website of the Association.

Under no circumstance shall any records be stored on line that has Member personal financial identifying information such as bank numbers, social security numbers, etc.

The Association will ensure that the hosting server service fees are paid on time so as to guarantee safe record retention of online records. Secure links will be made available to authorized personnel for the purposes of downloading backups of the entire record set.

The Association and the Board of Directors will ensure that usernames and passwords for the protected area are secured and only available to authorized personnel. Authorized personnel are specifically defined as a) Board members, b) the Association's Accountant and c) Associations Bookkeeper.

This policy has been written to help ensure continuity and accuracy of the Association's records year-over-year and as Officers and Directors rotate in and out of leadership roles.

Last update: June 11, 2013