

KindCare

Client Records Management Policy and Procedure



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Policy Statement

KindCare is committed to ensuring the privacy and confidentiality of all clients.

Client Privacy and Confidentiality

Private or personal client information must not be disclosed to any person who does not require the information to perform their role within the organisation.

Client records must be stored securely to prevent accidental and intention unauthorised access.

Support workers must ensure they do not discuss client information:

- With others (including other staff) who do not need the information to perform their role
- With other staff who require the information to perform their role, in a setting in which they can be overheard by others

Storing Client Records

Client records may be stored on the KindCare server, or using an online file sharing platform. My Department Stores staff may use Box; www.box.com, Dropbox; www.dropbox.com, or Google Docs; <https://docs.google.com/>.

Security

All personal or private records must be stored with a password. Passwords will be created and shared between staff who have a need and a right to access the record. When a password has not yet been created, the default password KindCare001 can be used.

File Naming Conventions

All documents should be saved using the following file naming convention:

[File Name] ([Author Name]) [DDMMYYYY]

For example:

Customer Survey Results (John Smith) 04072018

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Filenames should indicate the:

- Client details (e.g. the client's initials)
- Record type (e.g. Case notes, Report, or similar)