



# Record Keeping

## Purpose

The purpose of this policy is to ensure that accurate, complete, and up-to-date records are maintained for all clients of Coastal Care (CC). The policy provides guidelines for the management of client records to ensure confidentiality, privacy, and compliance with legal and ethical obligations.

## Scope

This policy applies to all staff members and contractors of Coastal Care.

## Policy Statement

Coastal Care is committed to maintaining accurate, complete, and up-to-date records for all clients. We recognise the importance of maintaining the confidentiality and privacy of client information and complying with legal and ethical obligations.

## Procedure

### Types of Records

We will maintain the following types of records for each client:

- Personal information (e.g., name, address, contact details, date of birth, and emergency contact information)
- Health information (e.g., medical history, allergies, medications, and care plans)
- Financial information (e.g., billing and payment information)
- Service delivery information (e.g., support provided, progress notes, and incident reports)

### Record Keeping Standards

CC will ensure that all records are accurate, complete, and up-to-date, and that they comply with legal and ethical standards. We will maintain records securely and ensure that access to records is limited to authorised personnel only.

### Record Keeping Procedures

We will maintain records in a manner that reflects the individual needs and preferences of clients. Records will be updated promptly, and staff members will document all relevant information in a timely and accurate manner. All records will be stored securely and backed up regularly.

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Person Responsible:	Service Manager	Next Revision Date:	12/04/2025



### Confidentiality and Privacy

We will ensure that all records are kept confidential and comply with relevant privacy legislation. We will only disclose client information with their consent, or where required by law.

### Record Retention and Disposal

We will retain records for a minimum of seven years after the completion of service delivery. After this period, records will be securely destroyed, taking into account any legal or regulatory requirements.

### Access to Records

Clients and their authorised representatives have the right to access their records. CC will provide access to records in a timely and appropriate manner and ensure that clients' privacy and confidentiality are protected.

### Continuous Improvement

CC will continuously review and improve our records keeping policy and procedure to ensure that we are providing the best possible service to our clients and complying with legal and ethical obligations.

## VARIATIONS

Coastal Care reserves the right to vary, replace or terminate this policy from time to time.

## RELATED DOCUMENTS

- Workplace Health and Safety
- Managing Challenging Behaviours
- Critical Incidence Management
- Incident Reporting

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