

## **Client Record Keeping Policy**

In Balance Physiotherapy and Fitness (IBPF) will maintain individual client files. These have both a hard copy and electronic component. Hard copy files contain the client's referral and case history information, signed confidentiality agreements and paper-based assessment forms and resources.

### **Client therapy notes**

Client therapy progress notes and demographic information are stored in electronic form on Cliniko. All clinical records will follow the SOAP format.

### **Data storage**

All electronic files are password protected and securely stored in the company system. All hard copy files are stored in a locked filing cabinet.

### **Access**

Client files (hard copy and electronic) will only be accessed by IBPF Management and relevant employees. Parent/s, legal guardians and clients over 18 years can access the information contained in their files by contacting IBPF, 306 Fitzgerald St, Northam Western Australia, 6401 in writing, by emailing [reception@ibpf.com.au](mailto:reception@ibpf.com.au) or by calling Alex Gazis-Morris (IBPF Director) on (08) 9622 5335.

### **Audits**

Client files (hard copy and electronic) will be audited annually according to the IBPF client file audit procedure.

### **Standards of record keeping**

IBPF employees will maintain high standards of record keeping. Dated and signed records will be made in the electronic client file on every occasion of contact. Client reports are written as required and on request and saved electronically. If more than one staff member is involved with a client, a combined report is the preferred method of report writing.

### **Retention of data**

Once a client has been discharged, client records will be kept (electronically and/or physically archived) for 7 years after last contact provided the client has attained 25 years of age.