



A Level II Accredited Company

<b>Policy Number: 1290</b>	<b>Page 1 of 1</b>
<b>Effective Date: 1 January 2016</b>	<b>Replaces: 15 January 2015</b>

<b>SECTION: CLIENT SERVICES</b>
<b>TOPIC: CLIENT FILES</b>

All client files must be kept confidential.

It is expected that client files are updated and reviewed to ensure they are accurate, consistent, and complete.

Client Files are accessible to the Guardian(s), others as designated by the Guardian, Agency Employees directly involved with the client, and as specified in Agreements or Legislation. Individuals with legal status equivalent to that of an independent adult may also access their own file.

Information from client files may be accessed by external sources only with written authorization (i.e., guardian or client with legal status) and in accordance with the Agency's Release of Information Policy and the Freedom of Information and Protection of Privacy Act. Service Area Coordinators/Directors will ensure appropriate, full, and timely disclosure of client information (as it relates to transition to a new service provider) when consent is given (subject to the considerations below).

Except for requests for information based on Agreements or Legislation, a request to release personal information may be denied if the agency believes there is a significant risk that disclosure of the information would cause either, harm to the client's physical, mental, or emotional health; or harm to a third party. Denial of a request must be reviewed with the Executive Director. The reasons for denial of a request will be communicated in writing to the requesting party within 30 days of the request.

Removal of client files, in whole or in part, from the Administration Office or a program setting may only occur for authorized usage and at the discretion of the Coordinator/ Director. These files must be returned by the next working day.

It is expected that Employees update active client files a minimum of once a month. The structure of client files is service area specific and is outlined within service area procedures. All client files remain the property of the Agency, unless authorized by the Executive Director.

Reference

- Confidentiality and Release of Information Policy 3040
- Records Retention and Disposition Policy 3310
- Freedom of Information and Protection of Privacy Act
- Personal Information Protection Act