

Interchange Policy & Procedure Manual

▶ Policy 3.9 Customer File Management

DATE OF BOARD ENDORSEMENT	JANUARY 2008
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CURRENT VERSION	V1.1

Reference Documents

- National Standards for Disability Services (Standard 1)
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Policy Statement

All customer records are to be kept up to date and stored with appropriate security measures. This information is only to be accessible to the Chief Executive Officer and appropriately delegated staff for the express purpose of them performing their operational roles.

Procedures

- ▶ Customer files will include the following information as a minimum:
 - Name of customer;
 - Address and phone number of customer and family and/or advocate;
 - Name of any other relevant parties such as accommodation provider;
 - Emergency contact details;
 - Details of any special issues such as allergies, phobias, behavioural triggers; and
 - The Individual Service Plan (including the Personal Medical Record).
- ▶ All documentation pertaining to a customer should be logically/chronologically filed.
- ▶ All transactions including letters, telephone calls (even if unanswered), facsimiles, hard copies of emails or advice/referrals, should be retained on a customer's file.
- ▶ Customer files are to be stored in a lockable cabinet.