

Record Keeping, Privacy & Confidentiality

Marli and Moe values mutual trust and places the client experience at its core. As a high-quality support provider all staff members are privy to personal, private, and confidential information relating to clients. How this information is managed is vital to establishing and maintaining a trusting relationship with the clients.

The management of client information can have significant legal ramifications.

Breach of management responsibility may result in disciplinary action and may constitute a breach of privacy laws.

All staff has a duty to protect the privacy of the clients' information.



Practice Management Software

Marli and Moe use Cliniko as its practice management software. It is used for the following:

- Diary management
- Maintaining client records
- Invoicing and billing
- Recording payment information
- Automated patient appointment reminders
- Online bookings

Support and Case Note Writing

All clients who are seen by Support Coordinators / Specialist Support Coordinators must have case / progress notes taken and recorded in Cliniko as part of their legal requirements and to maintain the standard of care consistently.

ALL email, text etc communications referring to clients are to be copied and recorded into the client's case notes for appropriate record keeping.

Our Procedure for maintaining privacy -

Staff must:

- Routinely ask clients for permission
- Routinely double-check both the content and the recipients of emails before they are sent.
- Routinely scroll down email chains to check all information in the entire email chain is appropriate.
- Avoid using full client names in the subject line of emails
- Avoid using client names in all forms of electronic communication, for example SMSs unless required.
- Avoid using client names in phone conversations where there is the risk of being overheard.



- Verify all outgoing information and to approve and sign off on the response to any request. It is recommended that all requests from outside third parties are in writing, accompanied, where possible, by evidence of consent or other legal basis for making the request.
- All client notes and correspondence are to be kept on file, either in original form, or as a scanned copy uploaded into the digital database of that client.
- No client medical information is to be provided over the phone without due diligence in verifying the authenticity of the caller. Due diligence includes requesting written correspondence to be provided complete with a signature from the authorised person. Such correspondence is to be filed within the client file.
- Personal information about staff, colleagues or management is never to be passed onto any third party without prior approval. This includes, mobile numbers, personal email addresses, date of birth or any other personal information.
- Team Leaders are to be made aware of all external correspondence that involves confidential or private information.

