

G. Retention and Destruction of Records

SAFE keeps an accurate and complete file system, which provides a file for each client and a record for each service. All client records are regarded as confidential, and their availability is limited to SAFE advocates and administrative staff who must work with the records. Each client has the right to review their own record/file in the presence of the administrator or designee and to obtain copies of their records.

1. Access to client and administrative files is controlled and monitored by the Executive Director.
2. All advocacy sessions over 15 minutes in length are documented on the Client Service Form. This excludes help line calls, except where it is known that the caller has an existing Client Service Form, in which case, the caller's primary advocate should document the service. Advocates are to complete Client Service Forms as thoroughly as possible.
3. Client Service Forms are turned in to the Executive Director no later than the seventh business day every month. Service record data is compiled into an aggregated reporting system for statistical and information purposes and for reporting to funders, and is backed up weekly.
4. The compiled aggregated data reports are retained at the center for three years from the end of any funding agreement under which services were provided.
5. SAFE maintains only those Client Service Forms deemed necessary to provide a record of service within three years of any funding agreement's reporting period under which services were provided. All remaining documentation will be destroyed within 6 months after the client discontinues services.
6. All service records are safeguarded and protected against loss, unauthorized alteration, or disclosure of information by storage in locked file cabinets in a secured room in SAFE's administrative office, only directly accessible to approved SAFE staff.
7. Active files are kept in a locked file cabinet within view of the client's advocate.