



Title: Policy and Procedure

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Section: 5 Care & Record Management

Date: June 1, 2018

Policy: HH5-1B Storage & Handling  
Clients/Employee Records

Replaces: February 2, 2017

## Storage of Client and Employee Records

### Procedure:

Family and Friends Office Manager is the primary person responsible for making sure that all clients and employee records are stored in a locked file cabinet. The Office Manager has the master key to the file cabinet and keeps the master key locked in a locked key box located within the office.

- A. The office clerks have access to the locked key box and must ensure that the file cabinet is locked any time the office staff leaves the office or if unauthorized guests are present.
- B. The office door also has a lock to ensure that the files are doubled locked during office staff are not available. The master key is controlled by the Warren Urban League Facility Manager and is signed out at the beginning of the day and signed back in at the end of the day.
- C. No clients or employee files or records with personal information are to be left out on the office desk or on printer/faxes. This is a violation of HIPAA and any employee found violating this breach privacy will be counseled immediately and possibly terminated.
- D. All clients and employee records are managed in the ClearCare Health System, and only approved office staff member are authorized to have access to the secured encrypted health system.
  - a. Employees are not allowed to share their login in password with other employees or to login as another employee. Violation of this policy will be automatically terminated.
  - b. Employees are not allowed to let unauthorized staff or people view the system. Violation of this policy will be automatically terminated.
  - c. Employee must have passcodes or fingerprint access on all personal and work computer/laptops to include all smartphones and tablets
  - d. State laws generally govern how long medical records are to be retained. However, the Health Insurance Portability and Accountability Act (HIPAA) of 1996 (HIPAA) administrative simplification rules require a covered entity, such as a physician billing Medicare, to retain required documentation for six years from the date of its creation or the date when it last was in effect, whichever is later

Departments Involved in Development: Board of Directors, Compliance Committee, Legal Counsel

Committee or other Review/Approval and dates of approval: Board of Directors (6/18), Compliance Committee (6/18)