Community Member File and Information Guidelines

Rationale

These guidelines are designed to ensure that:

- Clear processes for recording and storying Community Member information and accurately reflecting a person's recovery journey are in place;
- Community Member files are kept secure and confidential;
- Community Member information is recorded consistently across our services; and,
- Files are maintained to a high quality and that they meet funding obligations for data collection and maintenance.

Files

Community Member files will contain the following information:

- ☐ 1. Member Details Form
- ☐ 2. Privacy and Consent
- ☐ 3. Your Safety and Supports
- ☐ 4. Nominated Support People (NSP)
- ☐ 5. Handbook Checklist
- ☐ 6. Plans
- ☐ 7. Miscellaneous (including notes, letters, referrals etc)

Section Dividers and Binding

To ensure the integrity of filed information, a plastic sleeve will be used for each section with a contents page at the front. These will be secured in place using a binder and a cardboard paper file will be used as a cover. A tracking sheet may be used to track the date that forms are completed and the date that they will be reviewed. This can be attached to the inside cover. The name of Community Member will be on the side. Files will be stored alphabetically by first name.

If a Community Member regularly accesses two (or more) Brook RED services, the contents of their file should be replicated and a copy, along with any updates, kept at each service. This allows staff to access important information such as medical, emergency contact and safety information and ensures consistency and continuity of support across centres in regards to plans and plan reviews.

Storage

Files will be kept in a locked filing cabinet at centres. Files will be maintained actively while a member continues to access services and will be archived on exit. Files will remain archived for 7 years following exit and will be destroyed after this time passes. If a member returns to a Brook RED service while their file is in archive, the file will be returned to active files.

Internal auditing

Files will be audited for compliance with these guidelines every 6 months by each service and outcomes of these audits will be reported to the General Manager.

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Database
Some information from Community Member files will be entered into the Brook RED online database as a backup of information. Our database requires an ID and password to access information. Only Brook RED agents who require access to this information will have access.

Access
Community Members are able to access their information on request consistent with recovery-oriented practice. Community Members can access their personal information on request within a reasonable time period and if it is reasonably and practicable to do so. Please see the Privacy Policy for more information.

Correction
Records can be corrected at any time if information is incorrect or out of date.

References
Brook RED Privacy and Confidentiality Policy

Document Control and Record of Changes

Version	Effective Date	Approved by	Summary of Change	Date of Next Review
Version 01	May 2017	Eschleigh Balzamo	Introduction of new guidelines	January 2018
Version 02	September 2019	Eschleigh Balzamo	Review and update	January 2021
Version 03	June 2021	Eschleigh Balzamo	Review and update	August 2024
Version 04	January 2024	Eschleigh Balzamo	Review and update	August 2025
Version 05	September 2026	Blake Barber	Review and update	September 2026

The General Manager has overall responsibility for these guidelines. If there are any questions regarding these guidelines, please direct these to the Business Services Manager or General Manager.