**PEOPLE'S PLACE**

Client Access to Records Policy

Approved By: Board of Directors
Review/Revision Date: 5/01/2011

## I. PURPOSE

The purpose of this policy is to establish guidelines for clients to access their records.

## II. POLICY STATEMENT

It is the policy of People's Place that clients will have access to their records per program standards. In some cases, the access will be limited or restricted.

## III. APPLICATION

This policy applies to all People's Place staff and clients.

## IV. DEFINITIONS

Client Records – information maintained in a client's file.

## V. STANDARDS

A. A client will have access only to agency generated information.

B. All information that identifies someone other than the client will be removed prior to the client accessing the file.

C. A client may be charged a fee for record preparation and for any copies requested.

D. All client requests for access to records in their file must be in writing. Time frames for access to records will be set per program standard.

E. All requests must be submitted to a Program Director or a designee.

F. All programs will follow the above standards for client access to files unless dictated otherwise by contractual, regulatory requirements, or best practice requirements.

## VI. PROCEDURES

| **Individual Responsible** | **Action** |
|---|---|
| Client | 1. Submits request on Request for Access to Client File Form. |
| Program Director or Designee | 1. Reviews request.<br>2. Makes a determination of access.<br>3. Documents determination and date for review on Request for Access to Client File Form.<br>4. Determines costs for record preparation and copies.<br>5. Assigns task of preparing records for review, making copies, etc.<br>6. Notifies client of determination, date of review and cost. |
| Preparer | 1. Prepares file for review by determined date.<br>2. Accompanies client during review.<br>3. Makes requested copies and informs client of total cost. |

## VII. REFERENCES

None

## VIII. EXHIBIT

Request for Access to Client File Form