

## Record-Keeping Policy

### Policy Statement:

At Intersection Therapy, we are committed to maintaining accurate and secure records of our clients' therapy sessions and related information. This policy outlines our procedures for record-keeping to ensure the confidentiality, accuracy, and accessibility of client records.

### Confidentiality:

- Confidential Nature: Client records are confidential and protected by the laws of British Columbia. The content of these records is accessible only to authorized personnel involved in the therapy process.
- Access and Release: Client records will not be released to any third party without the client's written consent, except as required by law or in cases where there is a risk of harm to the client or others. If clients need to provide records to a third party, the Request for Information (ROI) Form will need to be submitted. Fees of \$170/page will apply (e.g., charged to insurance provider), unless otherwise discussed with your therapist.
- Client Access: Clients have the right to request access to their own records. Requests for access should be made in writing to the therapist. Access to records will be provided in accordance with applicable privacy laws and regulations.

### Record Content:

- Client Information: Records include client demographic information, contact details, and relevant medical history.
- Session Notes: Detailed session notes are maintained for each therapy session. These notes include the date, duration, topics discussed, interventions used, and progress assessments.
- Assessments and Treatment Plans: If applicable, assessment tools, treatment plans, and progress reports will be included in the client's records.
- Correspondence: Copies of any correspondence related to the client's therapy, such as emails or letters, may be retained in the client's records.
- Summaries of Treatment: Upon request, a summary of treatment can be drafted and provided to a third party at a cost of \$170/page.

## Record Retention:

- **Retention Period:** Client records will be retained for a minimum period of 7 years after the termination of therapy, as required by local regulations. For minors, records will be kept for 7 years after the client reaches the age of majority. After this period, records may be securely destroyed in compliance with applicable laws.
- **Secure Storage of Therapy Records:** All therapy records, including client demographic information, session notes, assessments, and treatment plans, are securely stored on third-party servers provided by "Jane App." We take the utmost care in ensuring the confidentiality, security, and privacy of your records.
- **Third-Party Storage Provider:** Our chosen third-party provider, Jane App, is committed to protecting patient data. Jane App's privacy and security policies are in place to safeguard your information. You can learn more about Jane App's policies by visiting the following link: [Jane App Privacy and Security Policies](#). This addition informs clients of the third-party storage provider and provides a link for clients to review Jane App's privacy and security policies for further assurance of the security of their records. Intersection Therapy reserves the right to change third-party storage provider without notice.

## Accuracy and Updates:

- **Client Input:** Clients are encouraged to provide accurate and up-to-date information to ensure the integrity of their records.
- **Therapist Responsibility:** Therapists are responsible for maintaining accurate and detailed records of each therapy session. Session notes should reflect the content and progress of each session accurately.

## Access to Records:

- **Authorized Personnel:** Access to client records is limited to authorized personnel directly involved in the therapy process. This includes therapists, supervisors, and administrative staff who require access for administrative purposes.
- **Protection of Records:** Client records are protected with strong passwords and encryption when stored electronically. Physical records are stored in locked filing cabinets in secure locations.

## Disposition of Client Records:

- **Upon Termination:** Client records will be retained for a minimum period of 7 years after the termination of therapy, as required by local regulations. For minors, records will be kept for 7



years after the client reaches the age of majority. After this period, records may be securely destroyed in compliance with applicable laws, unless clients request otherwise.

- **Client Requests:** Clients may request copies of their records or choose to have their records transferred to a new therapist of their choice. Clients' preferences regarding their records will be honored, subject to legal requirements and ethical considerations.

## **Client Records in the Event of Therapist's Death or Incapacitation:**

In the unfortunate event of a therapist's death or incapacitation, Intersection Therapy has established procedures to ensure the proper handling of client records, as outlined:

- **Executor or Designee:** The therapist will designate an executor or responsible individual who is authorized to access and manage client records in accordance with applicable laws and regulations.
- **Notification:** The executor or responsible individual will notify clients of the therapist's passing as soon as reasonably possible, using contact information available in the records.
- **Client Options:** Clients will be provided with options regarding the disposition of their records, which may include transferring records to a trusted colleague or securely archiving records for the legally required retention period.
- **Confidentiality:** The executor or responsible individual will maintain the confidentiality of client records during the transfer or archiving process, and records will continue to be subject to the same confidentiality protections.
- **Record Retention:** In accordance with applicable laws and regulations, client records may be securely archived or transferred to a designated professional or institution for safekeeping.

## **Client Feedback and Concerns:**

Clients are encouraged to provide feedback or express any concerns related to the accuracy or handling of their records. Any concerns will be addressed promptly and professionally.

## **Client Education:**

Clients are encouraged to engage in open dialogue and proactive communication with their therapists regarding this policy to ensure that their unique needs, preferences, and concerns are addressed in therapy.



# Intersection Therapy

## **Updates and Amendments:**

Clients will be informed of any updates or amendments to this policy, including how changes will be communicated and the effective date of any policy revisions.

## **Policy Review:**

This policy may be subject to periodic review and updates to ensure its effectiveness and alignment with our commitment to providing quality online therapy services.

**Last Updated:** August 2023

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**Intersection Therapy**

604.757.5158

[www.intersectiontherapy.ca](http://www.intersectiontherapy.ca)