

POLICY	Record Keeping
POLICY NUMBER	CFL027
EDITION	
DATE OF ISSUE	REVIEW DATE
SIGNATORY	

## 1 Introduction

CONFIDANCE for Life seeks to be compliant with the Data Protection Act 1998. This policy should be viewed in association with the CONFIDANCE for Life Data Protection Policy.

## 2 Policy Statement

CONFIDANCE for Life recognises that record keeping is an integral part of providing and maintaining quality of services provided to service users. Good practice in record keeping promotes high standards of practice and ensures continuity in the level of service provided. It also ensures ease of audit for the external monitoring agencies.

## 3 General Principles of Recording Information

Forms and records should

- Be maintained in accordance with CONFIDANCE for Life's Data Protection Policy
- Be signed and dated
- Distinguish clearly fact from opinion
- Be completed as soon as possible after the event and provide up-to-date information
- Be factual, legible, consistent and accurate
- Provide clear evidence of decisions made and information shared

## 4 Forms and Records Retained by CONFIDANCE for Life

- Order Forms:
  - Should be kept in the Ordering and Receipts folder
  - Should include appropriate details of all items being ordered
  - If completed incorrectly should be marked with VOID across the page and placed in the Order Forms folder, not discarded.
  - Should be attached to both the Payment Confirmation Form and sales receipt on payment of goods

- Payment Confirmation Form
  - Should be kept in the Ordering and Receipts folder
  - Should include appropriate details of all items being ordered
  - If completed incorrectly should be marked with VOID across the page and attached to the relevant Order Form in the Order Forms folder, not discarded.
  - Should be attached to both the Order Form and sales receipt on payment of goods
- Receipts
  - Should be kept in the Ordering and Receipts folder
  - Should be attached to both the Order Form and Payment Confirmation Form on payment of goods
- Pre-Programme Questionnaires
  - Questionnaires must be kept in a folder unique to the programme and clearly labelled on the outside with the Project name and dates: eg. C U Shimmy: Aug 2010 – Dec 2010
- Post-Programme Questionnaires
  - Questionnaires must be attached to the corresponding Pre-Programme Questionnaire in the folder unique to the programme.
- Project Evaluation Form
  - The Project Evaluation Form must be retained in the Project Data Folder.
- Project Critique Form
  - Project Critique Forms should be kept with the associated Project Review Form until the Project Monitoring audit has taken place, then the Critique Forms should be destroyed.
- Project Review Forms
  - Any amendments made to the Project programme should be listed on the Project Review Form. If no amendments are felt necessary, this should be indicated on the Project Review Form.
  - Project Review Forms should be kept with the completed Project Critique Forms, in a folder clearly marked with the Project and the programme date eg C U Shimmy: Aug 2010 – Dec 2010, until the Project Monitoring audit has taken place. The Project Review Form should then be retained in the Project Review Folder.
- Equipment Book
  - To assist in stock-control, all equipment purchased by CONFIDANCE for Life for use in the dance projects will be listed in the Equipment Book under each project.
  - Replacement items will be annotated on the relevant list of equipment.
  - All equipment used in the dance projects must be signed out of the Equipment Book, by the artist/teacher heading the project at the start of each programme.
  - All equipment used in the dance projects must be signed into the Equipment Book by the artist/teacher heading the project at the end of each programme.
  - Any damaged equipment will be annotated on the relevant list of equipment.