PEOPLE OF PEONY'S RECORDS AND INFORMATION MANAGEMENT POLICY AND PROCEDURE

What is This About?

At People of Peony, we keep important information and records about our work and the people we support.
This policy explains:
- What kind of information we keep
- How we keep it safe and private
- Who can look at it
- When we update or throw it away

What is a Record?

A **record** is anything that shows what we did or decided. It could be:
- A document
- A note in a file
- An email
- A message
- A photo or video
- Something in a computer system

What Do We Keep Records?

We keep records to:
- Make sure we support you properly
- Show what decisions were made
- Keep your information safe
- Follow the law

Keeping Information Safe

We make sure all your information:
- Is private
- Is only seen by the right people
- Is stored safely (in locked cabinets or secure computer systems)
- Is kept for the right amount of time

Who Can See Records?

Only staff who need to see your information to do their job can look at it. You can ask to see your own information too.

Where We Store Information

We keep your information in:
- **BREVITY** (for participant records)
- **XERO** (for finances)
- **GSUITE** (for emails and other files)

We use passwords and secure logins to keep your information safe.

Paper Records

If we write something on paper, we keep it in a locked cabinet.
Only trained staff can get the keys.

Using Computers and Phones

We make sure:
- All work computers are locked when not in use
- No private files are saved on USBs or personal emails
- Emails that are important get saved properly
- Phones and apps are used safely

Writing Down What Happens

Staff must:
- Write down important things that happen (like support you received or a decision made)
- Keep the notes honest, clear, and respectful
- Use the right system to record it

Keeping Old Records

Sometimes we keep records for a long time.
For example:
- Your support notes are kept for 7 years
- Tax records are kept for 5 years
  We do this to follow the law.

Throwing Out Old Records

When we don't need records anymore:
- **Paper records** are shredded safely
- **Digital records** are fully deleted or destroyed
  We never just leave them lying around.

Cloud Storage

Some information is saved "in the cloud" (like Google Drive). We make sure these are safe, but we also know:
- Even cloud systems can be looked at by governments in some cases
  So we are careful what personal info is saved there.

Staff Training

All staff are trained in:
- How to keep your information private
- What to write down
- How to store and delete things safely

We also check regularly that staff are doing the right thing.

You Have a Right To

- Know what we keep about you

- Ask to see your records

- Ask for changes if something is wrong

- Be told how your info is used

- Feel safe and respected

We Keep Getting Better

We review this policy every 2 years (or sooner). We listen to your feedback and make changes if needed. Because your privacy matters.

DOCUMENT CONTROL

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