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| **Insert name of organisation** |
| **Information Management Policy** |

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| Policy number: Date adopted: |
| Authorised by: |
| Date last reviewed: | Reviewed **by insert name of officer, position title** | Date of next review: |

Refer to Section 6 below for information on the process for policy review.

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| **Policy context:** This policy relates to: |
| Legislation or other requirements | **Insert legislation that applies** |
| Other standards | **Insert other accreditation systems that apply** |
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***1. Purpose: Why do we have an Information Management policy?***

To provide an effective and high-quality service and to maintain appropriate accountability, we rely on documentation which demonstrates regulatory compliance, guides our service delivery and management practices, and records the work we do with service users. Some documentation is generated by us, others, such as contracts, come from others. This policy guides our management of information, both paper based and electronic, to meet our accountability and compliance requirements, and ensure efficiency and business continuity.

***2. Scope***

This policy will apply **to indicate which aspects of the organisation’s activities the policy will apply to.**

**Are there any limits or conditions on the way the policy applies to some aspects?**

***3. Policy statement: Our commitment***

**Insert organisation name** is committed to maintaining clear and accountable information systems to support and record our management processes and service delivery to clients, and which protect rights of staff and clients with regard to privacy and confidentiality.

Specifically, we will:

**What will your organisation do to implement this policy? List your actions below**

***4. Procedures***

*4.1 Communication Strategies*

Underpinning the management of information in **insert name of organisation** are the following communication strategies:

**List the processes your organisation uses to communicate information to staff, volunteers, service users, Committee and other stakeholders.**

**Indicate who is responsible for various aspects of communication**

*4.2 Policies and Procedures*

The **insert name of organisation** Policies and Procedures include the following components:

**List the kinds of policy and procedure documents your organisation has**

**Identify who is responsible/authorised to amend or approve these documents**

**Detail where these documents (hard copy and electronic) are kept and how can they be accessed**

*4.2.1 Updating Policies and Procedures*

**Identify the processes your organisation uses to:**

* **Identify the need to change a policy**
* **Track changes to policies to ensure that the most current and approved version is being used**
* **Gain approval for policy changes**
* **Communicate policy changes to staff and service users (as appropriate)**
* **Ensure policy changes are reflected in other procedural documentation (forms, registers, etc)**
* **Review policies on a regular basis**

*4.3 Service User Information*

**Describe how information about service users is collected and stored**

**Describe this process protects service user confidentiality**

**Detail how this information is accessed**

Processes should be covered in in your Privacy,Confidentiality and Access to Confidential Information policies. If so, make reference to these policies.

*4.4 Staff and Volunteer Information*

**Identify what information is collected about staff and volunteers**

**Explain how it is stored and how it can be accessed**

*4.5 Minutes of Meetings*

**Identify types of meeting minutes kept and where they are stored**

**Explain how they can be accessed**

**Detail particular processes which ensure decisions are recorded**

*4.6 Other Administrative Information/Other Documents*

**List the other kinds of (current) documents which are stored**

**Detail how they are stored**

**Explain how they can be accessed**

*4.7 Archiving*

**Identify who is responsible for archiving and maintenance of archives**

**Identify how archives are organised and stored**

**List the timeframes for retention of different types of information**

**Identify processes used to dispose of archived information when these timeframes have elapsed**

*4.8 Electronic Data*

**Identify how electronic data is organised and maintained**

**List any rules about file naming, saving documents**

**Identify who has authority to:**

* **Set up new files or alter existing ones**
* **Install new programs**

**Explain how electronic data is backed up and who is responsible for this**

**Identify any specialist programs(such as data collection, client records)with specific instructions for use**

**Detail any rules for use of Emails, Internet and Social Media** (You may consider a separate policy to cover these –if so, make reference to that policy here)

*4.9 Maintaining Computer System and Electronic Data Systems*

**Explain how your computer system is maintained**

**Detail how technical support is provided and how it can be accessed**

***5. Other related policies and procedures***

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| **Documents related to this policy** |
| Related policies | **List related policies** |
| Forms or other organisational documents | **List related organisational documents** |

***6. Review processes***

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| Policy review frequency: **Indicate how often this policy will be reviewed**  | Responsibility for review: **Indicate who will review this policy**  |
| Review process: **Describe how the policy will be reviewed**  |
| Documentation and communication: **Describe how the policy decisions will be documented and communicated**  |