



Claire Donaldson - Holistic Therapist

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Record Keeping Policy

As a sole trader in holistic therapies, maintaining accurate and organized records is essential for providing high-quality services, ensuring client safety, and meeting legal and regulatory requirements. Please review our record keeping policy outlined below:

- Purpose:** The purpose of this record keeping policy is to establish guidelines for the creation, maintenance, and retention of client records and other business-related documentation.
- Types of Records:** We maintain various types of records, including but not limited to:
 - Client intake forms: Information collected during initial consultations, including personal details, health history, and treatment preferences.
 - Session notes: Detailed records of each client session, including the treatment provided, client responses, progress notes, and any recommendations or follow-up care.
 - Consent forms: Signed consent forms acknowledging client understanding and agreement to our policies, procedures, and treatment methods.
 - Financial records: Invoices, receipts, payment records, and other financial documentation related to client transactions and business expenses.
- Confidentiality and Privacy:** Client records are treated with the utmost confidentiality and privacy. Access to client information is restricted to authorized personnel only, and measures are in place to protect against unauthorized access, disclosure, or misuse of client data.
- Retention Period:** Client records are retained for a minimum period of 6 years following the last session or transaction, in accordance with legal and regulatory requirements. After the retention period has elapsed, records are securely destroyed to ensure client privacy and confidentiality.
- Security Measures:** We implement appropriate security measures to safeguard client records, both in electronic and physical formats. This includes password protection, encryption, secure storage facilities, and access controls to prevent unauthorized access or loss of data.



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6. ****Accuracy and Completeness****: Client records are maintained accurately and kept up to date with relevant information. Any changes or updates to client records are documented promptly and reflect the most current information available.

7. ****Access****: Clients have the right to access their personal information held by us.

8. ****Training and Compliance****: All staff are trained on record keeping policies and procedures to ensure compliance with legal and regulatory requirements. Reviews are conducted to assess compliance and identify areas for improvement and relevant training provided.

9. ****Disposal of Records****: At the end of the retention period, client records are securely disposed of using methods that ensure permanent destruction, such as shredding or electronic wiping, to prevent unauthorized access or disclosure.

10. ****Changes to Record Keeping Policy****: We reserve the right to update or modify our record keeping policy as needed. Any changes will be communicated to staff and clients as appropriate.

By adhering to this record keeping policy, we demonstrate our commitment to maintaining the highest standards of professionalism, confidentiality, and integrity in our holistic therapy practice.

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Privacy Policy

At Shewa Living - Holistic Therapies, we are committed to protecting the privacy and confidentiality of our clients' personal information. This privacy policy outlines how we collect, use, and safeguard the information provided to us.

1. ****Information We Collect****: We may collect the following types of information from clients:

- Personal information: Name, contact details (phone number, email address), date of birth, and other information provided voluntarily by clients.

- Health information: Medical history, current health conditions, medications, allergies, and other health-related information necessary for providing holistic therapy services.

2. ****How We Use Your Information****: We use the information collected for the following purposes:

- Providing holistic therapy services: Personal and health information is used to assess clients' needs, customize treatment plans, and deliver high-quality services.

- Communication: We may use contact information to communicate with clients regarding appointments, follow-up care, special offers, or other relevant information.

- Record-keeping: Personal and health information may be recorded for documentation purposes, including session notes, progress reports, and client records. (see our Record-Keeping Policy)

- Legal compliance: We may use personal information to comply with legal obligations, such as maintaining accurate records and reporting requirements. In relation to children this will include any safeguarding reporting (see our Safeguarding Policy).

3. ****Data Security****: We take appropriate measures to protect the security and confidentiality of client information, including:

- Secure storage: Personal and health information is stored securely in paper format, with access restricted to authorized personnel only.

- Confidentiality agreements: Our staff are required to adhere to strict confidentiality agreements to protect client privacy.

- Data encryption: Electronic data transmission is encrypted to prevent unauthorized access or interception.

- Claire Donaldson (Shewa Living) is registered with the ico. and holds a Data Protection Certificate (GDPR).



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4. ****Data Sharing****: We do not disclose or share client information with third parties without consent, except in the following circumstances:

- Legal requirements: We may disclose information if required by law or in response to a valid legal request, such as a court order or subpoena, or in regard to children, any safeguarding concerns.

- Health and safety: In cases where there is a threat to the health or safety of the client or others, we may disclose information to appropriate authorities.

5. ****Client Rights****: Clients have the following rights regarding their personal information:

- Access: Clients may request access to their personal information held by us and request corrections or updates as needed.

- Consent: Clients have the right to withdraw consent for the collection, use, or disclosure of their personal information at any time, subject to legal or contractual restrictions.

- Deletion: Clients may request the deletion of their personal information, subject to legal or regulatory requirements.

6. ****Changes to Privacy Policy****: We reserve the right to update or modify our privacy policy as needed. Any changes will be posted on our website and communicated to clients as appropriate.

By engaging our services, clients consent to the collection, use, and disclosure of their personal information as described in this privacy policy. If you have any questions or concerns about our privacy practices, please contact us.

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