

POLICY AND PROCEDURE

REACH for Tomorrow

Record Access Procedure

Program: Behavioral Health Day Treatment / Partial Hospitalization Program

Effective Date: March 15, 2026

Review Date: March 15, 2027

Responsible Party: Compliance Officer / Director of Medical & Clinical Services

Purpose

To establish standardized procedures governing access to clinical records in order to protect confidentiality, comply with privacy regulations, and ensure appropriate use of protected health information (PHI).

Policy

Access to client records is limited to authorized personnel who require the information to perform their job responsibilities. All access must comply with applicable privacy laws, including HIPAA and 42 CFR Part 2 when applicable.

Authorized Access

Authorized access to clinical records may include:

- Clinical staff involved in the individual's treatment
- Medical providers responsible for care
- Administrative staff performing authorized operational functions
- Compliance or quality improvement personnel conducting audits
- The individual served or legally authorized representative

Electronic Record Access

Clinical records maintained within the electronic health record (EHR) system are protected by secure login credentials. Staff are responsible for safeguarding their login information and must not share credentials with others.

Client Requests for Record Access

Individuals served have the right to request access to their clinical records. Requests must be submitted in accordance with organizational record request procedures and may require completion of a written request form.

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Approved records will be provided within the timeframe required by applicable laws and regulations.

Release of Records

Records may be released to external individuals or organizations only when:

- A valid Release of Information (ROI) is on file, or
- Disclosure is otherwise permitted by law.

Only the minimum necessary information will be released to fulfill the request.

Documentation Requirements

All record access and disclosures must be documented when required and may include:

- Date of access or disclosure
- Name of the requesting party
- Purpose of access
- Information released
- Staff responsible for processing the request

Security and Confidentiality

Staff must ensure that records are accessed and viewed in a manner that protects confidentiality. Unauthorized viewing, copying, or sharing of records is prohibited and may result in disciplinary action.

Audit and Monitoring

Access to records may be monitored through system audit logs, compliance reviews, and quality improvement activities to ensure appropriate use of protected health information.

Training

Staff will receive training regarding record access procedures, confidentiality requirements, and privacy protections appropriate to their role.