Newfoundland & Labrador
College of Social Workers

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Documentation Matters: Tip #6

How should I handle requests for the release of client information?

Requests for access to client records may originate from various sources including the client, a client's family member, other professionals, insurance companies or through a court subpoena. The following are elements to consider:

- Informed Consent – has the client requested or consented to the release of their record or information?
- Nature of the Request – what information is being requested, for what purpose, and how will it be accessed?
- Ethical Standards and Guidelines – what sections of the CASW (2005) Code of Ethics/Guidelines for Ethical Practice and NLCSW (2020) Standards of Practice apply?
- Legal – is there legislation that provides direction on what information may be accessed or released (i.e., Personal Health Information Act, Children, Youth and Families Act)? Would a legal consult be helpful or warranted?
- Organizational Policy – what policies/guidelines exist pertaining to the disclosure of client information?
- Confidentiality & Privacy – if disclosure is permitted, how much information needs to be shared to meet the request or purpose (i.e., access to full file or a summary report)? How will this be communicated to the client?
- Does the file contain information pertaining to another person?
- Documentation – has the request for the release of client information and decisions been appropriately documented?

For more information related to social work documentation, visit the NLCSW website www.nlcsw.ca