

Documentation Matters: Tip #9

Protecting client information and records when working from home: what are some key considerations for social workers?

The NLCSW (2020) Standards of Practice states: “Social workers ensure the confidentiality of client information obtained through the social work relationship” (p. 7). The following are important considerations pertaining to social work documentation when working from home:

- What professional standards should I consider? Importantly, a review of the CASW (2005) Guidelines for Ethical Practice - Section 1.7 (client records) and 1.5 (privacy and confidentiality), and NLCSW (2020) Standards of Practice - Standard 5 (documentation), Standard 6 (confidentiality) and Standard 8 (technology) is advised.
- How am I able to safeguard client information? The CASW (2005) Guidelines for Ethical Practice notes “Social workers protect the confidentiality of clients’ written and electronic records. Social workers take reasonable steps to ensure that clients’ records are stored in a secure location and that clients’ records are not available to others who are not authorized to have access” (p. 8). Examples: computer passwords, client records not being visible to household members, locked cabinets.
- What organizational policies exist? “Social workers are aware of and comply with legislative requirements and organizational policies for the retention, storage, and security of client files” (NLCSW, 2020, Standards of Practice, p.6).
- Do I keep jot notes from my electronic meetings with clients? Once information is documented, jot notes should be securely destroyed in keeping with organizational policy.
- Are clients aware that I am working from home? Ensuring clients are aware of the steps taken to protect their information is an important part of the informed consent process.



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