



Record Keeping Policy

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1 OVERALL STATEMENT OF POLICY

It is the responsibility of 1st Homecare to ensure that it keeps all the records it is required to in relation to its clients and carers, and that these are maintained in accordance with its obligations as a care provider and as an employer. The Company's policies in this regard are set out in the Company's Data Protection Policy and Privacy Notices attached to that Policy, in its Confidentiality Policy, and in this Policy.

2 RECORD KEEPING IN RELATION TO CLIENTS

Since 2020, each branch of 1st Homecare uses a digital care planning system called Access Care Planning on which are held critical information regarding 1st Homecare's clients as well as Care Plans and risk assessments and the visits and tasks carried out for clients, together with visit notes made by carers in relation to those tasks. This is a far more secure way of keeping records than paper care plans, risk assessments, visit notes (or daily record sheets) and other paper records previously kept in the client's home, which could potentially be viewed by anyone who enters the client's home. They can only be accessed and viewed by Company employees on a Company owned PC/laptop/tablet or on a Smart phone, by logging on with a username and password, or by the client or their family (with consent) using the "Next of Kin" app on a Smart phone, also password protected.

The replacement of paper records by digital records means that as well as far greater security, there is also far greater accuracy and far more transparency in the records kept in relation to clients. Carers record the tasks completed by marking them either as complete or incomplete and must complete a visit note if the task is marked incomplete. Carers also make notes where required eg. to note a change in the client etc. Carers are also asked to record details of any changes in the client's health, mood, physical condition or needs; details of food prepared and whether the client ate the food or not, and to report any accident or incident, error or near miss, any issue concerning medication, or anything else significant e.g. a previous missed call by another carer or other information that would assist in ensuring the client's needs are met. Details of any financial transactions undertaken on behalf of the client are also to be recorded and the financial transaction record completed correctly and the client's signature obtained

Any accidents or incidents must also be reported to the Office, or On call manager if out of hours, using the Report to Office form and an Incident Form must be filled out promptly and accurately. The Office staff will enter the accident/incident onto PeoplePlanner as an event, with appropriate follow up action and responsibility, and will also file the form in the client's file held on Dropbox.



3 ACCESS TO RECORDS

Clients and/or their representatives (with client consent) will have access to client records via the Next of Kin app on their phones. They will also have the right to view the information held in relation to them in accordance with the Data Protection Act. Reference should be made to the 1st Homecare Data Protection Policy.

4 MONITORING RECORD KEEPING

1st Homecare monitors records made by its carers as part of its quality assurance processes. Care Plan Activities on Access Care Planning are checked to ensure they have been completed for each visit, to check any that are uncompleted, and to check for notes made by the carers. MAR and eMAR will be audited by a person delegated the task by the Branch Manager to check for, for example, incompleteness, inaccuracy or inadequate recording. All matters noted shall be recorded with follow up actions and a responsible person assigned to deal with the actions. It will be reviewed and signed off by the Branch Manager.

5 AMENDMENTS TO THIS POLICY

This Policy may be amended at any time as may be required and a new version produced. Staff shall be informed of the amended version.

**Change History**

Issue	Date	Description of Change and Reason
1	October 2014	First Issue
2	May 2016	Second Issue – change of address, minor changes to wording
3	January 2017	Third Issue – to make applicable to both offices
4	December 2018	Fourth Issue – change of address of Oxford office, tidying up of layout and wording
5	December 2021	Fifth Issue – insertion of KL office address and also reference to record keeping where Access Care Planning is used

DOCUMENT CONTROL

Name of document	Record Keeping Policy
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Owner	1HC
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