



WEST LIMERICK INDEPENDENT LIVING CLG

Care Records and Documentation Policy

Policy Reference	WLILP65
Category	Operational Policies — Records & Documentation
Version	2.0 (numbering conflicts flagged, leftover editing artifact removed)
Status	APPROVED — by the Board of Directors on 9 October 2026
Supersedes	WLIL53 - Care Records and Documentation Policy
Policy Owner	Board of Directors, West Limerick Independent Living CLG
Applies To	Service Coordinators, Personal Assistants, Management, and administrative staff involved in maintaining service records
Related Policies	WLILP7A - Data Protection Policy; WLILP46 - Records Management Policy; WLILP47 - Confidentiality and Information Sharing Policy; WLILP57 - Digital Risk Assessment Policy
Review Cycle	Annually, or sooner following significant changes to systems or legislation

1. Purpose

The purpose of this policy is to ensure that all records relating to the delivery of services by West Limerick Independent Living CLG (WLIL) are created, maintained, stored, and accessed in a consistent and secure manner.

Accurate documentation supports safe service delivery, effective communication between staff, and accountability in the provision of Personal Assistant and Home Support services.

2. Scope

This policy applies to all records associated with the delivery of services to clients of WLIL, including:

- Care plans and activity plans
- Risk assessments
- Service agreements
- review records
- incident reports
- service schedules and visit logs

This policy applies to:

- Service Coordinators
- Personal Assistants



- Management
- Administrative staff involved in maintaining service records

3. Principles of Record Keeping

All records relating to the delivery of services must be:

- accurate
- clear and factual
- completed in a timely manner
- respectful and professional in language
- maintained securely

Records must reflect the service delivered and must not include speculation, personal opinion, or inappropriate language.

4. Types of Service Records

WLIL maintains several types of records to support service delivery. These may include:

- Client referral and assessment documentation
- Service Agreement (Part A and Part B)
- Care Plans / Activity Plans
- Risk Assessments
- Emergency Action Plans
- Monthly review notes
- Incident reports
- Staff service schedules and attendance records

These records support the safe and effective delivery of services.

5. Electronic Records Systems

5.1 CarePlanner System

WLIL uses the **Nourish CarePlanner system** to support service delivery.

The system is used to:

- manage staff schedules
- store client care plans
- allow staff to log in and out of service visits
- maintain records relating to service delivery



Access to the CarePlanner system is restricted to authorised personnel, including designated Service Coordinators and administrative staff.

5.2 WLIL Risk Assessment App

WLIL maintains a dedicated **Risk Assessment App** which stores risk assessments and safety information relating to service delivery.

The system:

- maintains the **current active risk assessment**
- updates the active assessment when changes occur
- replaces previous operational versions when updates are made
- retains a **history log of changes**

Printed copies of risk assessments may be retained in the client file where required.

The Risk Assessment App is stored within WLIL's **Microsoft 365 SharePoint environment** and is secured through Microsoft's multi-factor authentication system.

Access to the system is limited to authorised employees with designated access permissions.

6. Client Files

In addition to electronic systems, WLIL maintains a **client file in hard copy format**.

Client files may contain:

- referral information and assessment documentation
- service agreements
- printed care plans
- printed risk assessments
- contact information
- review records
- incident reports or correspondence where applicable

Client files are securely stored in locked filing cabinets within the WLIL office and may only be accessed by authorised staff.

7. Recording of Service Delivery

Personal Assistants are required to follow the agreed care plan and record their attendance through the CarePlanner system by logging in and out of scheduled visits.

Any concerns relating to client wellbeing, safety, or service delivery must be reported to the Service Coordinator in accordance with WLIL procedures.



8. Confidentiality and Data Protection

All client information must be treated as confidential.

Records may only be accessed by authorised staff for the purposes of service delivery, administration, or governance.

This policy must be read in conjunction with:

- WLILP7A - Data Protection Policy
- WLILP46 - Records Management Policy
- WLILP47 - Confidentiality and Information Sharing Policy

9. Access to Records

Clients have the right to request access to their personal information.

Requests for access to records will be managed in accordance with WLIL's **Subject Access Request procedures** and relevant data protection legislation.

10. Responsibilities

Service Coordinators

Responsible for:

- maintaining accurate care plans
- completing service reviews
- ensuring documentation is updated when required

Personal Assistants

Responsible for:

- following the agreed care plan
- recording attendance through the CarePlanner system
- reporting concerns or incidents

Management

Responsible for:

- ensuring appropriate systems are in place for record keeping
- monitoring compliance with organisational policies
- ensuring records are maintained securely

11. Related Policies

This policy should be read alongside:



- WLILP68 - Care Planning and Review Policy
- WLILP66 - Service Access, Referral and Assessment Policy
- WLILP46 - Records Management Policy
- WLILP47 - Confidentiality and Information Sharing Policy
- WLILP7A - Data Protection Policy

12. Record Integrity and Version Control

WLIL maintains systems to ensure the integrity and reliability of service records.

Electronic systems used for service delivery maintain the **current active version of records**, while system controls and change history logs record updates made by authorised personnel.

Risk assessments maintained within the WLIL Risk Assessment App are updated when changes occur, replacing the previous operational version while retaining a history of changes within the system.

Where required, printed copies of risk assessments and care documentation may be retained within the client file as part of the historical record.

Access to electronic systems is restricted to authorised staff and protected through secure authentication procedures.



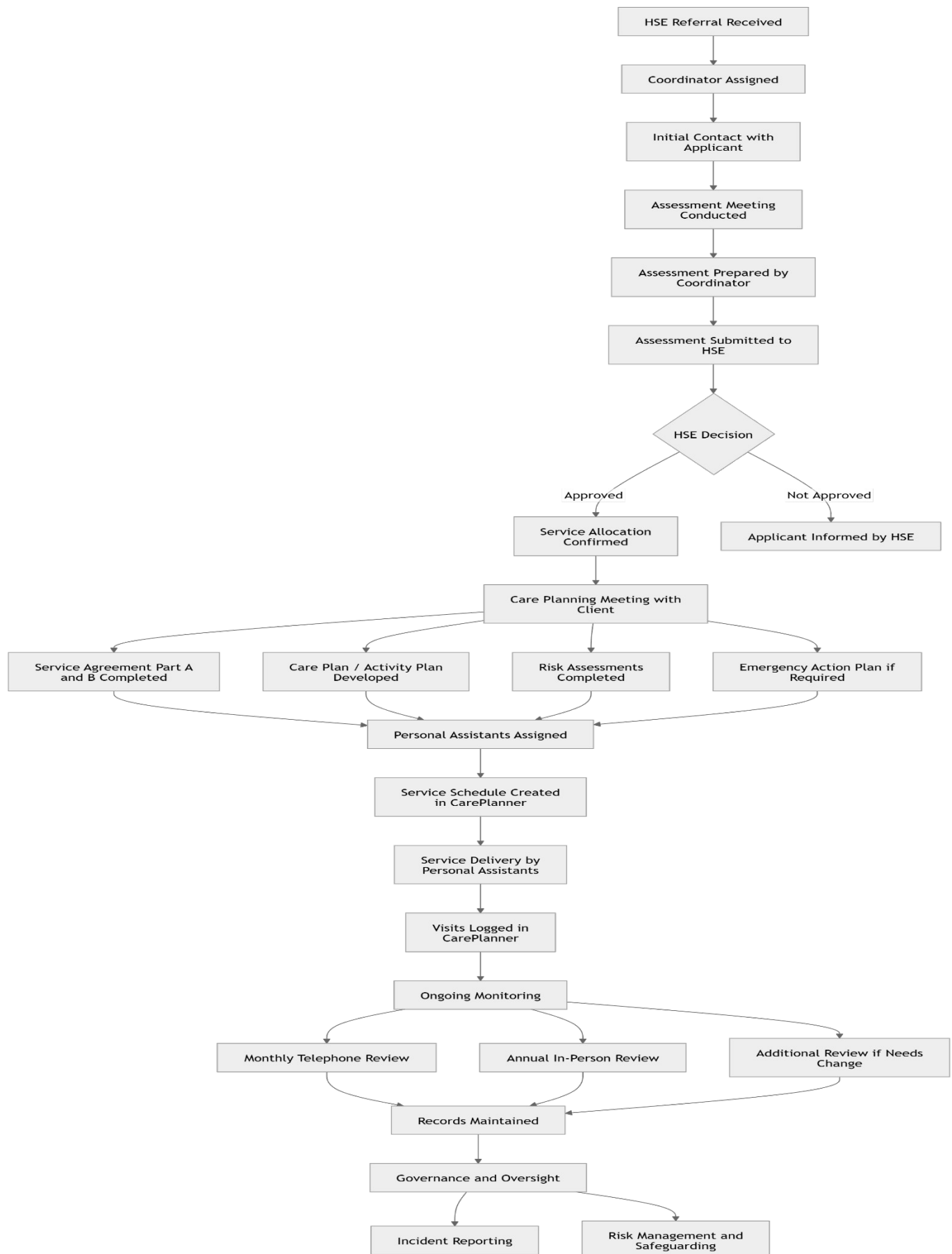
WLIL Service Delivery Governance Framework Diagram



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Approval

Approved by the Board of West Limerick Independent Living CLG on 9 October 2026.

Signed on behalf of the Board, on its instruction, by the General Manager:

Margaret O'Connor

Margaret O'Brien O'Connor, General Manager

Date signed: *09-10-2026*