

# Rotorua Lakes High School

## Te Hā o Te Manawa RTLB Cluster 20

### **POLICY: RTLB PRACTICE**

### **PROCEDURE: Documentation and Record Keeping**

RTLB gather and record information throughout their casework that provides evidence of the positive impact of their RTLB work.

#### **Guidelines**

##### 1. RTLB Casework:

- RTLB will keep dated contact logs for each case with brief notes. Contact logs will be included in each RTLB case file.
- RTLB will keep appropriate documentation at each step of the RTLB practice sequence as part of their case files. Examples of documentation are listed on the *RTLB Service Delivery Framework* document.
- RTLB documentation and records will be available to RTLB Practice Leader and/or RTLB Cluster Manager to view.

##### 2. Schoolgate Data Collection System:

- The following will be completed and/or uploaded onto Schoolgate:
  - consented *Request for Support*,
  - collaborative *Intervention Plan* and/or reviewed *Intervention Plan(s)* under the 'Case Management' tab,
  - *LSF Application(s)*,
  - *Case Closure* report, under the 'Case Management' tab,
  - Outcomes Reporting.
- RTLB will ensure that the required data is completed on Schoolgate. RTLB Management team will ensure this data is available for the Ministry to extract on the reporting dates specified in the *Funding and Service Agreement*. Please refer to *RTLB Cluster Data and Ministry of Education Data Requirements - March 2015* for details.

##### 3. Privacy of Information:

- RTLB will refer to the Te Hā o Te Manawa *Student Information* procedure.
- Storage and security of personal information will be a priority for RTLB in order to protect the privacy and rights of teachers and other school staff, students and their whanau/families, RTLB colleagues, and other professionals working alongside the RTLB, whilst fulfilling the obligations of relevant legislation, including the Privacy Act 1993, Official Information Act 1982 and Human Rights Act 1993.

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#### 4. Archiving of RTLB Case Files:

- RTLB who keep electronic/online case files will archive them onto Schoolgate:
  - Upload all relevant casework documentation, including contact log, records of all meetings, summary of data, intervention plan(s), monitoring records, and reports from other agencies under the Case Management tab on Schoolgate.
  - Duplicate documentation will be deleted from RTLB electronic/online files.
- RTLB case files held in hard copy will be archived:
  - All relevant casework documentation, including contact log, records of all meetings, summary of data, intervention plan(s), monitoring records, and reports from other agencies will be sealed in an A4 archive envelope.
  - The name of the case, school and RTLB caseworker(s), and the month and year of case closure, will be recorded on the front of the archive envelope.
  - Archived files will be stored in each RTLB Hub.
  - Any information not relevant to the case will be confidentially disposed of.
- Records will only be kept to serve the interests of the individuals concerned, and to provide generalised data for reporting purposes by the RTLB Cluster Manager and Lead School Principal, for 7 years.

**REVIEW:** This policy will be reviewed according to Te Hā o Te Manawa's triennial programme of self-review November 2019, or as required.

**DATE CONFIRMED:** 29 November 2016