



Correspondence & Documentation Policy
(Formally the Policy on Written Documentation)

The way we communicate and correspond with the individuals we serve, our community partners, and each other is vital to our success and growth as an organization.

Written documentation and correspondence is viewed as an important vehicle for agency representation and is critical to the success of Center For Family Services. All written documentation and correspondence should be written with the understanding that the writing can be viewed at any time. All written correspondence, verbal communication, and documentation should be polite, professional, accurate, and neat. Staff should be clear about what forms of writing they are required to and privileged to write.

Confidentiality is our number one priority. It is expected that employees take the appropriate steps to keep client and agency documentation, communication, and correspondence confidential.

The following foundation guidelines have been set in place to guide you through Center For Family Services expectations of you regarding written communication, verbal correspondence and documentation. Please note that the following guidelines also apply to email correspondence.

This policy highlights best practices – it is not a comprehensive document. Please refer to Center For Family Services Code of Ethics, Goals and Values, and other policies and guidelines for additional expectations on communication and written documentation.

Written Correspondence

All outgoing correspondence must be on agency letterhead or sent from an agency email address. Both forms of communication should include the senders contact information.

Appropriate use of agency approved stationary such as letterhead is required by all staff. Center For Family Services approved letterhead is a primary means of communication with donors, funders, employees, and community partners. It is essential that the use of it positively reflects the mission and vision of the organization. Our letterhead plays an important role in communicating our brand image.

Center For Family Services letterhead should only be used for letters, any other usage is strictly prohibited.

The following outgoing correspondence may only be sent by Center For Family Services' President/CEO, COO or Senior Vice President:

- Letters to funding sources
- Grant applications and contracts
- Letters to public officials
- Letters or any kind of correspondence with attorneys
- Any correspondence with Center For Family Services insurance companies

- Any correspondence regarding client incidents
- Leases, agreements of sale, or documents which ask for a signature from an agency authorized representative or owner

The following outgoing correspondence may be sent by an Associate Vice President but COO's, Senior Vice President's, and President/CEO must be informed:

- Letters to client's terminating services
- Any correspondence regarding client incidents
- Letters or memos to staff regarding requests for leave, discipline, or termination issues

Contact with the press and media is handled by the Public Relations Department. Staff should never contact members of the press/media. As per the Communications, Fundraising, and Development Manual, staff should not solicit community members and local businesses for donations or sponsorships without first contacting the Public Relations Department.

Emails

Email is the primary means of communication at Center For Family Services. All staff must regularly check emails and respond to them accordingly. All staff are required to use a standard Center For Family Services signature line in their emails. The standard signature may be found by visiting the staff section of centerffs.org.

Verbal Communication

Center For Family Services values its employees as its greatest resource. Employees are expected to treat each other with professional and kind actions and words. When verbally communicating with other employees, be mindful of the following:

- All correspondence is to be polite and professional.
- It is never acceptable to negatively label a coworker.
- Consider utilizing both email and phone communication when trying to reach an employee.
- Be respectful to other employee's ideas, requests, suggestions, etc.

Correspondence Regarding Clients

Client records

Center For Family Services follows the law and protects confidential client information. Center For Family Services realizes that individuals and families trust their personal information with us. Clients and their families have a right to have their information safeguarded. They also have the right to request to review the information in their file. Therefore, Center For Family Services staff are expected to be very careful and respectful with any written information concerning clients. In addition, files are to be in good condition, allowing for someone else to service the client in the event that a new staff person needs to assist the client.

1. All written documentation is to be professional, legible and neat
2. Files must include signed HIPPA forms

Last Revised March 2016

3. Release of information forms must include date, signatures and to whom the information can be released. Release of information forms must have an expiration date and must be renewed every three months at a minimum or 12 months where applicable.
4. File forms should be filled out legibly and completely
5. Progress notes must be dated and signed.
6. Proper grammar and complete sentences should be used.
7. Documentation must be signed and printed with employee's proper name and title.
8. Supervisors are to review and sign off on files or have a system in place for file review on a regular basis, not less than every three months.
9. Records are to be kept in a secure locked location and may not be removed from these locations without the expressed permission of the supervisor.

Correspondence to clients

1. We must have the client's permission to send information to them through mail or email.
2. The program supervisor must approve correspondence to clients and their families. (note requirements above regarding need for executive approval.)
3. Professional correspondence should be clear and factual without any judgments.
4. Correspondence concerning a client's termination of services should be kind and respectful, and when possible leaving an opportunity for the client to reapply for services in the future or to access another CFS program.

Correspondence concerning a client

Center For Family Services only releases information when necessary and in the best interest of the client. Center For Family Services must have a signed release form by the client or their legal guardian to send correspondence about the services they receive through CFS. Request from the courts, attorneys etc. must be reviewed to be certain that the release of client information is actually required. Center For Family Services follows the law. Questions concerning release forms should be submitted to the Senior Vice President of Administration.

1. All written correspondence regarding a client should be released on a "need to know" basis. For example, if a referring agent needs to know if a client is attending sessions, this is much different from knowing what the client is sharing during the sessions. Staff should be sure to know the details of the release form.
2. Written correspondence should only include specific information requested and allowed for.

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I, _____, acknowledge that I have read and will adhere to the Correspondence and Documentation Policy.

Staff Signature

Date