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Storage of Information

Policy 10

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1 INTRODUCTION

1.1 STORAGE OF INFORMATION - NDIS PRACTICE STANDARD

NDIS Practice Standards and Quality Indicators states that management of each participant's information ensures that it is identifiable, accurately recorded, current and confidential. Each participant's information is easily accessible to the participant and appropriately utilised by relevant workers.

1.2 POLICY STATEMENT

Beyond Barriers Australia is committed to collecting, storing, managing, and destroying personal information in a manner that upholds the privacy, confidentiality, safety, and rights of all Participants. This policy outlines how we manage information, particularly the storage, archiving and destruction in line with legal, ethical, and regulatory requirements.

This policy is guided by the [Privacy Act 1988 \(Cth\)](#) and the [NDIS Practice Standards](#). Our approach prioritises secure handling, informed consent, limited access, and appropriate use of all private and sensitive information.

1.3 SCOPE OF POLICY

This policy applies to all personal, health, and sensitive information collected and stored by Beyond Barriers Australia in relation to Participants, including consent forms, support documentation, case notes, incident reports, and other relevant records.

It applies to all staff, volunteers, contractors, and authorised personnel involved in the handling, access, or management of this information, across both digital and physical systems.

1.4 VALUES DEMONSTRATED BY BEYOND BARRIERS AUSTRALIA

- a) Beyond Barriers Australia recognises the importance of upholding privacy and confidentiality, and respecting personal information that is entrusted to us.
- b) Beyond Barriers Australia is committed to managing Participant information responsibility and in line with obligations outlined in this policy.

- c) Beyond Barriers Australia recognises that Participants or their representative have control over their own information and when it should be shared.

1.5 DEFINITIONS

Participant	A person who receives support services from Beyond Barriers Australia.
Personal Information	Any information that can identify an individual (e.g., name, date of birth, address, NDIS number).
Sensitive Information	A subset of personal information including health details, disability status, cultural background, or other information requiring greater protection.
Mandated Report	A formal report made to an external authority due to legal reporting obligations (e.g., risk of harm, abuse, or neglect).
Case Note	A detailed re-count of tasks completed written objectively to record indications, work completed and risks identified.
Consent to Share Information Form	A form completed by the Participant (or their authorised representative) that grants permission to collect, store, and share their personal information.
Archiving	Securely storing digital information for long-term retention after it is no longer actively used.
Splose	A secure care management system used by Beyond Barriers Australia to record and manage Participant information.
Google Drive	A secure cloud-based storage system used to manage Participant files and organisational documents.

2 STORAGE OF INFORMATION

2.2 STORAGE OF INFORMATION

Beyond Barriers Australia is obligated to store all private and confidential information securely to ensure its protection and uphold Participants' rights to privacy and confidentiality. Information is stored to retain accurate records, monitor work and progress, record risks, and ensure accessibility when sharing is required to support effective service delivery.

Storing information is essential for coordinating care, fulfilling legal and NDIS obligations, and safeguarding the safety and wellbeing of Participants. We are committed to managing personal information in accordance with the [Privacy Act 1988 \(Cth\)](#), the [NDIS Practice Standards](#), and other relevant legislation.

This section outlines how consent to store information is obtained, the systems used to protect that information, and our obligations regarding secure storage, access, and destruction.

2.3 RECORDS OF CONSENT

Signed [Consent To Share Information](#) forms, which provide permission to collect, store, and share information, are securely stored in Participants' digital files in line with the requirements outlined in this policy.

[Consent to Share Information](#) forms remain valid for 12 months and must then be reviewed. Beyond Barriers Australia conducts regular file audits and will monitor consent expiry, initiating the review process as required.

Participants or their authorised representatives may change or withdraw consent at any time. It is their responsibility to notify Beyond Barriers Australia of any such changes. Consent remains active unless otherwise specified by the Participant or their authorised representative. Consent will also cease if services with Beyond Barriers Australia are terminated (in accordance with the [Entry and Exit Policy](#)) or if the Participant advises that they wish to change or withdraw their consent. See [Privacy and Confidentiality Policy](#) for full consent to share information process.

2.3 FILING SYSTEM

All private and confidential information is kept electronically on Beyond Barriers Australia's care management software (Splose), and in Participants' personal files located in the Beyond Barriers Australia Google Drive. Digital storage platforms used by Beyond Barriers Australia are private and secure with password protections in place. Splose and Beyond Barriers Australia's Google Drive both have backup integrations to protect information in the case of a system failure.

Beyond Barriers Australia operates a predominantly paperless filing system. Where physical documents are held, they are stored securely in a locked filing cabinet located on the organisation's premises. Access is restricted to authorised employees only. The cabinet key is stored separately within the building, in a secure location accessible only via electronic fob entry.

Physical documents are held for a maximum of 14 days, or until an agreed time where they can be returned to their owner (a Participant or their representative). In this time, the documents will be scanned and uploaded to the digital storage platforms. Physical documents can then be destroyed. All documents are to be stored as per the above while they are in the possession of Beyond Barriers Australia.

2.4 SECURITY

Beyond Barriers Australia's digital storage platforms are password protected and only accessible by Beyond Barriers Australia's employees.

a) Splose

- I. Splose is a care management system used to record Participant information, case notes, store consent and other forms, and record billing to NDIS Plans.
- II. Each employee has a unique login to Splose, and all accounts are password protected. Files cannot be shared or accessed by personnel outside of Beyond Barriers Australia.
- III. Splose uses an integrated backup system for safe long-term storage and information recovery in the event of a system failure.

b) Google Drive

- I. Google Drive is a digital storage platform used to hold all electronic files including personal information, relevant documents, reports, NDIS plans, and more.

- II. Each employee has a unique login to the drive subject to password protection. Files cannot be shared or accessed by personnel outside of Beyond Barriers Australia.
- III. Google Drive uses an integrated backup system for safe long-term storage and information recovery in the event of a system failure.

Beyond Barriers Australia's business premises is a secure location, only accessible by electronic fob entry. The building is accessed by other businesses, maintenance staff, security personnel, and relevant council members. To protect the privacy and confidentiality of Participants, Beyond Barriers Australia ensures that all sensitive information is stored according to this policy, inclusive of physical and electronic documents.

2.5 LONG TERM STORAGE

Beyond Barriers Australia has a legal obligation to store Participant files for a period of 7 years after cessation. This is to ensure accountability, support continuity of care and to facilitate future assessments and reviews.

2.6 INFORMATION ACCESS AND USE

Information and media relating to Beyond Barriers Australia, including electronic storage devices such as USB drives, must not be removed from organisational premises without prior authorisation from the Director or their delegate. Further details of sharing guidelines are outlined in Beyond Barriers Australia's [Privacy and Confidentiality Policy](#).

Access to participant information is restricted to staff members who require it for legitimate business purposes and access is granted based on employees roles and its relevance to their role. All information must be treated with the highest level of confidentiality as per the [Privacy and Confidentiality Policy](#) and must not be disclosed except where legally required or otherwise authorised.

The use of records by staff is subject to monitoring, and regular file audits are conducted to ensure records are accurate, current and managed in accordance with organisational procedures.

3 RECORD KEEPING

3.1 ACCURATE RECORD KEEPING

Information and records are essential for effective service delivery and the continuity of operations. Accurate case notes provide reliable evidence of activities, interactions, and support provided. Case notes and accurate record-keeping is integral where risks have been identified, or in situations where a participant may be placed at risk.

Detailed and accurate records also ensure Beyond Barriers Australia can demonstrate the measures taken to manage and mitigate risks over time, including where notes are subpoenaed or formally reviewed.

Beyond Barriers Australia maintains a records management system that is proportionate to the organisation's scale which ensures that each participant's information is documented accurately and in a timely manner.

Record keeping processes support everyday business operations and are informed by a commitment to continuous improvement. Beyond Barriers Australia is dedicated to maintaining information and records management practices that address business needs and are in line with NDIS record keeping requirements.

3.2 CASE NOTING

Beyond Barriers Australia is required to maintain accurate case notes in accordance with operational requirements under the National Disability Insurance Scheme. Case notes provide evidence of services delivered, capture important information for monitoring, and support the tracking of Participant progress.

All case notes must be written objectively, documenting work undertaken, conversations, observations, and significant details. Maintaining accurate records is a mandatory requirement of accessing services with Beyond Barriers Australia, and staff are responsible for ensuring these records are kept to a high standard.

3.3 STORING MANDATED REPORTS OR SENSITIVE INFORMATION

Beyond Barriers Australia maintains a [Mandated Reports Register](#) to securely record all instances of mandatory reporting. These reports often contain highly sensitive information and, in some cases, it may not be in the Participant's best interest to be made aware of the report at the time it is made.

To ensure confidentiality is upheld, full details are recorded in the register, while a corresponding code is used in case notes and other Participant records. This system allows staff to reference the report internally without disclosing sensitive details in the Participant's file.

This approach balances the need for accurate documentation with our duty of care to protect the privacy, wellbeing, and safety of all individuals involved.

3.4 RECORDING MEETINGS OR INTERACTIONS

Beyond Barriers Australia's care management platform, Splose, has newly integrated features which include capabilities for audio recordings which can be translated into case notes. In the case that Beyond Barriers Australia utilises this feature in future, consent must be granted by the Participant or their representative and any other stakeholders involved in the meeting before any recording can occur. Unauthorised recording may be considered a breach of surveillance and recording laws.

3 DESTRUCTION OF INFORMATION

3.1 DESTRUCTION OF INFORMATION

Beyond Barriers Australia may be required to destroy private and confidential information in the course of service provision. When this is required, Beyond Barriers Australia will destroy information in the following ways:

- a) Shredding of physical documents which are disposed of;
- b) Archiving of digital documentation;
- c) Deletion of digital documentation after 7 years.

Before documents are destroyed, Beyond Barriers Australia follows the process outlined in [Section 2.3](#) of this policy pertaining to storage of information.

3.2 DESTRUCTION OF FILES AFTER CESSATION

Upon cessation of services, Beyond Barriers Australia will ensure that physical files and documentation are securely uploaded to Participants electronic files and then will destroy physical copies, as per process in [Section 3.1](#).

Beyond Barriers Australia has a designated area in the Google Drive for Archived Participant Files. When a Participant notifies Beyond Barriers Australia of a cessation, they will follow the cessation process (as per [Entry and Exit policy](#)), complete a handover if requested and then relocate the Participant's file to the archive. Beyond Barriers Australia must store files for a period of 7 years, and after such time they can be destroyed.

Participant profiles in Splose will be archived after all support activities have been billed and all outstanding invoices have been settled in full.

4 APPENDIX

RELATED DOCUMENTS

[Privacy Act 1988 \(Cth\)](#)

[Entry and Exit policy](#)

[Mandated Reports Register](#)

[Privacy and Confidentiality Policy](#)

[Consent to Share Information](#)

VERSION AND UPDATE HISTORY

Version	Date Approved	Nature of Changes	Approved By	Date of Review
V1	19/09/2025	Creation	Tiffany Kelly	19/09/2026