



MB Therapy
Person-Centred Counselling

Client Records

Record Keeping Policy

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Introduction

This Record Keeping Policy explains how client records are created, stored, accessed, and disposed of within my counselling practice. It is designed to ensure transparency, confidentiality, and compliance with professional, legal, and ethical requirements.

Scope

This policy applies to all counselling sessions conducted through:

- Video conferencing platforms (e.g., Zoom, Microsoft Teams, etc.)
- Telephone or mobile phone
- Any other online communication method agreed upon
- In-Person based therapy

Purpose of Record Keeping

Records are kept to:

- Support safe and effective counselling practice
- Maintain continuity and quality of care
- Meet legal, ethical, and professional obligations
- Provide an accurate account of the counselling work undertaken

What Records Are Kept

I may keep the following records:

- Personal details (e.g. name, contact details, date of birth)
- Assessment information and contracts
- Session dates and attendance records
- Brief counselling notes relating to themes and process
- Risk assessments and safeguarding-related information (where applicable)
- Correspondence via email, text message, or telephone
- Payment and invoicing records

Notes are factual, respectful, and relevant to the therapeutic work.

How Records Are Stored

- Electronic records are stored securely using password-protected and, where applicable, encrypted systems.
- Paper records (if used) are kept in locked storage.
- Access to client records is restricted to the counsellor only.

All records are stored in accordance with the **UK General Data Protection Regulation (UK GDPR)** and the **Data Protection Act 2018**.

Confidentiality of Records

- All client records are treated as confidential.
- Information from records will not be shared without client consent, except where there is a legal or ethical requirement to do so (e.g. risk of serious harm, safeguarding concerns, or court order).
- Records may be discussed in clinical supervision, with identifying details anonymised wherever possible.

Retention of Records

Records are retained only for as long as necessary and in line with professional guidance:

- Adult client records are retained for **at least 7 years** after the end of therapy.
- Records for children and young people are retained until **7 years after they reach the age of 18**.
- Financial records are retained for **7 years** in line with HMRC requirements.

After these periods, records are securely deleted or destroyed.

Client Access to Records

- Clients have the right to request access to their personal data held within counselling records.
- Requests should be made in writing and will be responded to within one month, in line with UK GDPR.
- In rare cases, information may be withheld if disclosure could cause serious harm to the client or another person.

Corrections and Updates

- Clients may request corrections to inaccurate or incomplete personal data.
- Records will not be altered retrospectively, but clarifying notes may be added where appropriate.

Data Breaches

- Any data breach will be handled in accordance with legal requirements.
- Where there is a risk to client rights and freedoms, the ICO and affected clients will be notified.

Changes to This Policy

This policy may be reviewed and updated periodically to reflect changes in legislation or professional guidance. The most current version will be available on my website.

Questions or Concerns

If you have any questions about how records are kept or used, please contact me using the details provided on my website.