



Policy Number: 33
Effective: January 1, 2013
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December 10, 2020; March 11, 2025;
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Subject: Log Notes

PURPOSE:

Camden County Developmental Disability Resources (CCDDR) shall have a policy that log notes are to be maintained electronically, and to document all contact, attempts at contact, and other pertinent information regarding the clients CCDDR serves.

DEFINITIONS:

Log Note (aka Case Note): This is the written documentation of contact and other pertinent information regarding a client, usually written by the Support Coordinator. These log notes are protected under The Health Insurance Portability and Accountability Act (HIPAA) and may contain sensitive information. Log notes are written electronically and saved in CCDDR's online Targeted Case Management database system.

Review Process: This is any regular review of the effectiveness of the services outlined in the Person-Centered Support Plan (PCSP).

PHI: Protected Healthcare Information.

HIPAA: Health Insurance Portability and Accountability Act

POLICY:

Log notes are part of the PHI protected by HIPAA. Log notes will be written in complete sentences, without misspelled words, and shall adequately explain the service provided and time allotted to the note. The note should tell what action occurred and why, and identify the parties involved. The reader should be able to infer from the description of who, what, where, when, why, and the benefit the individual received. The note should include observations, data, activities, and descriptions. The log note should always describe what the Support Coordinator has done. If referring to another document, the note should state the specifics related to that document. Each note must be able to stand on its own, explaining all abbreviations, and explain the connection of each individual person mentioned to the individual being logged upon. Log notes will not be sent to any individual, guardian, agency, or client as part of a regular review process. Log notes will not leave the premises, be they physically printed or in digital correspondence, in the absence of a court order or a valid authorization completed by the client or applicable personal representative, with limited exceptions.

The Targeted Case Management Supervisors, Targeted Case Management Director, Executive Director, or designated CCDDR Privacy Officer should obtain written information

regarding the identity of the requestor, the date of the request, the nature and purpose of the request, and any authority that the requestor has to request such information. If other staff receives a completed authorization and/or release form, they shall direct it to the Targeted Case Management Supervisors, Targeted Case Management Director, Executive Director, or designated CCDDR Privacy Officer for review. A Transfer Request received from another TCM entity after a client has re-located shall serve as authorization to release the last 6 months of log notes in an attempt to make the client's transition to new services more efficient.

Any other disclosures that occur shall be limited to the minimum amount of information necessary to meet the purpose of the use or disclosure. Exceptions to the minimum necessary requirement are as follows:

- The client or guardian authorizes the disclosure
- Disclosures required by law

Clients and guardians of clients can access these files according to the guidelines established by HIPAA and Division of Developmental Disabilities Directives.

REFERENCES:

- [Division of DD Directive 3.020](#)
- [Health Insurance Portability and Accountability Act Of 1996/Public Law 104-191](#)
- [DDD Targeted Case Management for Individuals with Developmental Disabilities \(Section 7.1\)](#)
- [Targeted Case Management for Individuals with Developmental Disabilities](#)