

Org2.2 Information Management

Purpose

1. Information management encompasses all the systems and processes within P4 Movement for the creation and use of corporate information.
2. This policy provides guidance in recordkeeping and information coordination for Board members, staff, Participants and external stakeholders at P4 Movement. References are made throughout this policy to more specific documents on Participant communication and external relationship guidelines.

Alignment with Practice Standards

1. Module 2: Provider Governance and Operational Management

Legislative Alignment

1. The Privacy Act 1988

Key Responsible Executive

General Manager

For More Support

General Manager

Policy Statement

1. P4 Movement considers people, processes, technology, content and information life cycles to ensure information is effectively managed.
2. Consistent, accurate, coordinated information is essential for effective Participant support and to prevent duplication of employee efforts.
3. Information management contributes to timely and relevant decisions, and to compliance with laws, regulations, policies, standards and accreditation requirements.
4. The P4 Movement framework for information management covers the following areas: description; ownership; security; compliance; sharing; quality and records.

Definitions

1. Information - is codified knowledge which is transferred and stored by means of documents, records, publications, databases, tools, images, plans, sound/video recordings, etc.

2. Document - refers to any of the forms in which information is carried.
3. Information management - includes the creation, collection, storage, access, use and disposal of information assets.
4. Identifiable information - refers to individual records containing age, sex and statistical components that could enable an individual's identity to be reasonably ascertained.

Outcomes

1. Information management systems enhance P4 Movement's ability to meet its strategic goals and actively contribute to the organisation's ongoing sustainability.
2. Information management systems foster the organisation's ability to build and maintain external relationships, are understood and used by all staff, and allow for more effective communication with and about P4 Movement Participants.
3. Records generated by P4 Movement are authentic, reliable, have integrity, and are usable.

Delegations

Roles	Responsibilities
Board of Directors	• Endorse Information Management Policy. • Support new and existing information management systems and supporting policies and procedures.
Management	• Lead information management processes including information sharing and systems review as part of core business processes. • Comply with and support new and existing information management systems and supporting policies and procedures.
Staff, volunteers, contractors and students	• Orientate new staff members to information management systems. • Contribute to information management processes including information sharing and systems review as part of core business processes. • Comply with and support new and existing information management systems and supporting policies and procedures.

Policy Implementation

1. This policy is to be part of all staff orientation processes and all staff and Board members should be familiar with their functions and delegations outlined in this policy. This policy should be referenced in relevant policies, procedures and other supporting documents to ensure that it is familiar to all staff and actively used.
2. This policy will be reviewed in line with the quality improvement system and the review of associated policies.

Procedures

1. Effective information management is crucial for P4 Movement to achieve its strategic goals. All staff members have a responsibility to utilise, develop and review existing information management systems as appropriate to their position.
2. P4 Movement's information management system:
 - a. satisfies statutory requirements about preservation and availability of business records
 - b. protects against risk
 - c. enables P4 Movement to demonstrate compliance with certification and accreditation requirements.
3. Ownership
 - a. Staff and managers know their responsibilities in relation to documents and records. There is an up-to-date list of authorised custodians of key information assets and records.
 - b. P4 Movement requires employees to return all of the organisation's information assets when their employment is terminated.
 - c. P4 Movement's intellectual property rights are protected. Where appropriate, copyright will be asserted, monitored and enforced.
 - d. All employees adhere to copyright owned by others.
4. Classification
 - a. The GM ensures there are consistent practices in naming, filing and describing documents; a standard classification system is used across the organisation.
 - b. When updated versions of documents are complete, the GM archives old versions of documents and informs all staff. This ensures that documents consulted are the correct and up-to-date versions.
5. Accuracy
 - a. P4 Movement aims to ensure information it collects, uses or discloses is accurate and complete at the time it is collected. In the event that Participants wish to correct errors in their information, corrections will be made where it is reasonable to do so. However, it may not be possible to correct information which has been de-identified, or has been published. In such instances, Participants will be informed of why the information cannot be corrected or changed.
 - b. Refer to the Privacy and Confidentiality Policy for details on Participant access to records.
6. Accessibility, Security and Storage
 - a. P4 Movement aims to store most corporate information electronically to increase information accessibility and minimise unnecessary use of paper.
 - b. Where paper files need to be kept (e.g. original documents with signatures) the same information management responsibilities apply.
 - c. Confidential documents and records are classified consistently and are protected, with access available to authorised staff only.
 - d. Preserving information with long term or historical value may be required for evidential or legal purposes

7. Information Coordination
 - a. P4 Movement shares and re-uses information and information systems subject to law and policy requirements.
 - b. Re-usable information is made widely available across the organisation to avoid redundancy and duplication of effort, and is organised and described in a way that makes it visible and easily re-used.
8. Information Coordination – external stakeholders
 - a. P4 Movement provides information to its external stakeholders through the following:
 - i. Website
 - ii. Quarterly Connections Newsletter
 - iii. Emails
 - iv. Participation in relevant external forums, groups and meetings.
 - b. A list of external stakeholder contacts is collated in the P4 Movement Dropbox Stakeholders Folder. All staff members are responsible for entering and removing relevant contacts into this distribution list.
 - c. P4 Movement attends numerous external meetings and committees that are relevant to the core business of the organisation and/or current projects. A record of these meetings (e.g. agenda, minutes and accompanying documents) is to be kept by staff electronically in an appropriate folder.
 - d. Similarly, records of conferences and forums attended by staff members (including copies of presentations if applicable) are to be stored in a relevant accessible folder.
 - e. Relevant information from external meetings, events and publications should be fed back to P4 Movement staff during staff and team meetings or via email.
9. Information Coordination – internal
 - a. P4 Movement's primary means for formal internal information coordination consists of annual employee roadshows. Informally, information is also shared via team meetings, emails and conversation.
 - b. The GM/Manager will report notable items from Board meetings to staff in staff meetings and decisions regarding program activities to be reported to the Board will be discussed in Board meetings also.
 - c. Where P4 Movement hosts advisory/reference group meetings as part of individual projects. A record of these meetings (e.g. agenda, minutes and accompanying documents) is to be kept by staff electronically in an appropriate folder in the P4 Movement Dropbox Stakeholders Folder.
10. Quality
 - a. High value reusable information and organisational records are easily distinguishable from lower value, more transient information.
 - b. Staff members are to refer to the GM/Manager or Service Manager before transferring information externally if they are unsure if the information is confidential or commercially sensitive (this includes adding information to the P4 Movement website).
11. Records
 - a. Records generated by P4 Movement are authentic, reliable, have integrity, and are usable.
 - b. Managing information to meet P4 Movement's operational and legal requirements includes:
 - i. Managing records throughout their life cycle
 - ii. Documenting activities and decisions
 - iii. Filing, securing and storing information
 - iv. Documenting, protecting and preserving information critical to P4 Movement business systems.
12. Participant Information
 - a. P4 Movement collects and provides information to and about Participants through communication mechanisms such as (but not limited to):
 - i. telephone calls
 - ii. letters

- iii. emails
 - iv. individual and group meetings
 - v. supervision sessions
 - vi. Participant files
 - vii. team and management sessions
 - viii. inter-organisational meetings to support mutual Participants.
 - b. The above may occur:
 - i. directly, with the Participant and/or family and carers
 - ii. internally, within P4 Movement (e.g. team meetings, supervision sessions, Participant files)
 - iii. externally (e.g. external supervision sessions, and other organisations supporting mutual Participants).
 - c. Any communication about a Participant will be made in line with P4 Movement's Privacy and Confidentiality Policy. Information collected and provided related to Participants is recorded in the relevant Participant file.
13. Participant Data Collection and Management
- a. Data collected by P4 Movement includes information relating to Participants' cultural background, age, gender, language, physical and mental health, medication, legal involvement and quality of life.
 - b. Additional data may be collected with the consent of Participants.
 - c. De-identified Participant related data will be forwarded to government endorsed national and state agencies, as per funding requirements.
 - d. P4 Movement ensures that Participants are aware of the data being recorded, the purpose of recording, and which data will be transmitted to other bodies (including funders and national statistical agencies) and for what purpose.
 - e. P4 Movement attempts to align data items on its administrative forms as closely as possible to national and state data collection items to promote quality, consistency and continuity of state and national data.
 - f. P4 Movement seeks to automate and digitise data collection to minimise errors in re-entry and issues with transcribing handwritten notes. This reduces employee effort and increases the quality, accuracy and timeliness of information collected.
 - g. Participant data is used only for the purposes for which it is collected, unless data has been de-identified or consent has been obtained to use the data for other purposes.
 - h. Information about Participants, including data collected by P4 Movement is maintained, reviewed, retained, secured and disposed of.

References to other P4 Movement policies and external sources

1. Org2.1 Risk Management
2. CS1.4 Privacy and Confidentiality
3. National Archives of Australia: Record Management webpage
4. Keenan, M. and Lambe, P. (2006). *Guidelines for Developing an Information and Records Management Policy*. Viewed 6 September 2010,

Summary of attachments

1. Nil

Version Control

1. 1 April 2026 - New Policy Creation