

Data Retention & Storage Policy

Summit Osteo & Performance
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ABN: 60 915 250 523
Effective: October 2025
Review Date: October 2026

1. Purpose

This policy outlines how Summit Osteo & Performance manages, stores, and retains patient health records and other confidential information in compliance with the Health Records Act 2001 (VIC), the Privacy Act 1988 (Cth), and the Australian Privacy Principles (APPs).

We are committed to maintaining the security, accuracy, and confidentiality of all personal and health information held by the clinic.

2. Scope

This policy applies to all patient records, financial records, and other sensitive business information collected and stored by Summit Osteo & Performance.

3. Record Retention Requirements

Summit Osteo & Performance adheres to the following minimum retention periods for patient records:

Adult patients: Records are retained for a minimum of seven (7) years after the last consultation date.

Patients under 18 years of age: Records are retained until the patient reaches 25 years of age.

After these timeframes, records may be securely destroyed or permanently de-identified in accordance with privacy and health record laws.

4. Storage and Security of Records

All records are stored securely to prevent loss, misuse, unauthorised access, or disclosure.

Digital Records:

Patient clinical notes are stored in Cliniko, a secure, password-protected clinical management platform that uses encrypted cloud-based storage.

Only authorised users have access to patient information.

Access is protected by individual logins, complex passwords, and automatic session timeouts.

Backups are automatically performed by the platform provider.

Physical Records (if applicable):

Any paper-based forms or consent documents are stored in locked cabinets within the clinic premises.

Keys and access to storage areas are restricted to authorised personnel only.

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5. Transmission of Information

When patient information is shared with third parties (e.g., GPs, specialists, insurers), it is transmitted securely via:

Encrypted email (where possible), or

Printed documents provided directly to the patient or mailed securely.

Information will only be shared with patient consent or as required by law.

6. Record Disposal and Destruction

When the retention period expires, records are securely destroyed or permanently de-identified:

Digital records are permanently deleted from secure systems and backups.

Paper records are cross-shredded or disposed of through a professional secure document destruction service.

Records will never be disposed of in general waste or unsecured environments.

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7. Breach Management

In the unlikely event of a data breach, Summit Osteo & Performance will follow the Notifiable Data Breaches (NDB) Scheme under the Privacy Act 1988 (Cth).

Patients affected by a serious data breach will be notified promptly with details of the incident and steps taken to mitigate risk.

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8. Review

This policy will be reviewed annually or whenever relevant privacy or health record legislation changes.
