



Client Confidentiality and Financial Records

Question: I am an SLP working in my first year of private practice. I am working with an accountant to ensure that my financial practices meet all requirements. My accountant has asked to review some of my financial records, which includes client invoices. As these invoices have my clients' names, addresses, and contact information on them, am I allowed to share my invoices with my accountant?

Answer: ACSLPA Standards of Practice outline requirements of privacy and confidentiality that apply to all client or patient data, including data included in financial records. Standards of Practice [2.2 Privacy/Confidentiality](#) and [4.3 Documentation and Information Management](#) are important to review if you are working in private practice. Client privacy and confidentiality must be maintained when financial records are to be viewed by anyone other than the service provider, the client, or the client's authorized representative(s).

In situations where there is a third-party request to view financial or administrative records, fully redacted or summary records should be provided (i.e., records redacted or summarized in a manner that meets ACSLPA's Standards of Practice and protects client privacy and confidentiality). If you continue to have questions about releasing unredacted client related financial information, you should seek legal advice specific to your circumstance. For example, privacy legislation requirements may be different when an acquisition or sale of a business is underway, when complying with an audit or inspection authorized or required by legislation, or for the purposes of an audit when it is not practicable to use non-identifying information.

