

AGE UK EXETER

Controlled Document

Document Name: Confidentiality Policy

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Approved by Board of Trustees on: Reviewed April 2021

Review Schedule: Every three years

Next review due: April 2024

Owner (Responsibility): CEO

Pass amendments to: Governance Officer

Revision History: See end of doc

Document Location: www.ageuk.org.uk/exeter/about-us/policiesandguidelines

Document Description

The confidentiality policy sets out the Charity's practices and procedures on the disclosure of information. The policy must be observed by all who work or volunteer at Age UK Exeter and have access to person-identifiable information or other confidential information.

Implementation & Quality Assurance

Implementation is immediate and this Policy shall stay in force until any alterations are formally agreed.

The Policy will be reviewed every three years by the Board of Trustees, sooner if legislation, best practice, or other circumstances indicate this is necessary.

All aspects of this Policy shall be open to review at any time. If you have any comments or suggestions on the content of this policy please contact the CEO on, info@ageukexeter.org.uk or at Age UK Exeter, The Sycamores, Mount pleasant Road, Exeter, EX4 7AE, 01392 202092.

Confidentiality Policy

1. Introduction

This policy applies to all staff, trustees and volunteers of Age UK Exeter. The data covered by the confidentiality policy includes:

- Information about the Charity, e.g. its plans or finances
- Information about individuals, e.g. clients, volunteers and staff whether recorded electronically or in paper form
- Information about other organisations

1.1 Reasons for this Policy Statement

- To protect the interests of our clients, staff, volunteers and other stakeholders
- To ensure all clients have trust and confidence in the Charity and that their dignity is respected.
- To protect the Charity, its trustees, staff and volunteers.
- To comply with data protection law.

2. Its meaning

1.1 All personal information about staff, volunteers, clients, their carers and families should be treated as confidential.

1.2 All information about the activities and business of the Charity and other stakeholders should be treated as confidential

1.3 Under no circumstances should staff and volunteers share personal or other confidential information with their own partners, family or friends.

3. Information about individuals

Age UK Exeter is committed to ensuring confidential services to all clients and will seek to ensure that:

3.1 All personal information will be treated as confidential. Information will only be collected that is necessary and relevant to the work in hand. It will be stored securely, accessible only on a need-to-know basis to those members of staff and volunteers duly authorised. The retention periods of personal information is covered in the retention section of the Data Protection Policy which should be read in conjunction with this policy.

- 3.2 Service users requesting ongoing individual support will be asked to sign and date a data consent form or in the case of Information and Advice or an urgent situation to give their verbal consent. This will authorise the Charity to:
- 3.2.1 keep written and/or computerised records of the service user's personal details and the work done on her/his behalf
 - 3.2.2 share information with other agencies only under the following circumstances:
 - 3.2.2.1 to ensure the safety and welfare of the service user
 - 3.2.2.2 where such information is relevant to the care arrangements and specific requirements of the service user
 - 3.2.2.3 where such information is required to ensure the safety and welfare of the persons concerned in the care of the service user
 - 3.2.2.4 To protect the safety and welfare of a child or other adult who may be at risk within the household.
- 3.3 Where consent is not given for the Charity to record and store basic information about the service user it is unlikely that a service will be able to be provided.
- 3.4 Where consent is not given for the Charity to share information externally a service will be provided and information shared only where there are immediate concerns about potential abuse or physical harm or where an indictable offence may have been committed. In such cases agreement will be sought from the CEO or in his or her absence a senior manager to share information with relevant agencies.
- 3.5 All information stored in Charitylog will be kept secure and treated as confidential.
- 3.6 Paper records will be kept in a locked cabinet with restricted access.
- 3.7 The signed consent form will be stored on the client's record.
- 3.8 All clients are made aware of their right of access to their records.
- 3.9 Every effort will be made to ensure the physical environment in which face to face discussions and telephone conversations take place does not compromise user confidentiality.
- 3.10 Clients will be made aware of their right to complain if they feel confidentiality has been breached.

4 Other Information

In the course of their work with Age UK Exeter, staff, trustees and volunteers may be privy to information about the business and other activities of the Charity or of other organisations or stakeholders which should remain confidential and not be shared with others, including colleagues.

Situations in which confidentiality will need to be broken

It is the responsibility of all staff and volunteers to ensure that any concerns arising from situations they observe, allegations (reports from third parties) or disclosures (reports from someone about themselves) relating to potential abuse or where an indictable offence may have been committed, are reported to their line manager even if they are unsure whether the concern is justified. It is not a breach of confidentiality to pass this concern on to an appropriate member of staff.

Please refer to the Safeguarding Policy.

5 Breach of Confidentiality

- 5.1 Breaches of confidentiality will be dealt with through the Charity's staff and volunteer disciplinary procedures as appropriate.
- 5.2 Staff or volunteers should notify any potential breach, or risk of breach, to their line manager or a senior manager without delay; so that steps can be taken to remedy the situation.

6 Glossary

Personal Information: By personal information we mean both:

- (a) The data protection definition which is any information which enables a living person to be identified (eg name, address, phone number, email address, nhs number etc or **Special Categories of Personal Data** which requires the individual's explicit consent for it to be held by the Charity, eg ethnicity, sexual life, political interests, religious beliefs, trade union affiliations etc. And
- (b) Information, written or verbal, about a client that relates to their health, circumstances, family or experiences that is either provided to you for context so that you can provide a personalised service and/or information you glean directly as a result of your contact with the client.

Revision History

Revision date	Summary of Changes	Other Comments
26.6.15	Routine review by Standards Committee	
14.7.15	Approved by Board of Trustees	Next review due June 2017
4.9.17	Routine Review by Standards Committee	Recommended to the Board for approval
12.9.17	Approved by Board of Trustees	Next review due September 2017
8.1.18	Reviewed to check conformity with CQS. Final bullet point added.	Recommended to the Board for approval.
9.1.18	Approved by Board of Trustees	Next review due January 2020
6.1.20	Reviewed by the Standards Committee. Extensively amended to reflect confidentiality across the whole organization and not just for service users data	Recommended to the Board for approval
14.1.20	Reviewed and approved by board of Trustees	Next review due January 2022
26.04.21	Amendments made for change of services and relocation	