

Dementia Befriending and Wellbeing service

SCHEDULE OF INFORMATION RETAINED AND PROCESSED FOR MEMBERS – AGE UK CAMDEN

Please be advised that this table represents the information that AUC (and subsidiaries where applicable) may retain in relation to your data. It also details when this information will be securely destroyed.

Please note that the organisation may keep basic anonymised information beyond the retention period for statistical reporting.

Information gathered and retained	Purpose for processing	Organisations that this information may be shared with and reason why See Appendix for organisations that information may be shared with.	Legal basis for procession	Assessment of data subjects interests	Duration of retention
Personal identifiers e.g. name, DOB, CLOG, reference number	<ul style="list-style-type: none"> To record referral on CLOG To identify the client To use when reporting for anonymisation Fit age criteria DOB To build case file on client – clog req CLOG number automatically generated Monitoring 	<ul style="list-style-type: none"> Used to make ongoing referrals Use in reporting Making enquiries Used to check identity of person with other agencies Used anonymously for funders 	<p>Necessary for the performance of a contract o which the data subject is a party.</p> <p>Necessary for the legitimate interests of the organisation.</p>	<p>Impact on data subjects rights and freedoms is very low.</p> <p>Processing is in data subjects interest.</p>	
Financial identifiers, e.g. National Insurance number	<ul style="list-style-type: none"> Required to help with identifying benefits advice. To refer to when going through verification check of some organisations. 	<ul style="list-style-type: none"> To be able to identify the client with the organisation contacted To provide advice and support to address their needs 	As Above	As Above	
Address	<ul style="list-style-type: none"> Communicate appointments Inform clients of events and meetings. To use when referring client to organisation, services and agencies Checking eligibility criteria – lives in Camden To identify services near where person lives To build case file on client – clog req 	<ul style="list-style-type: none"> To be able to identify the client with an organisation for identity purposes Provide advice and support to address their needs related to locality To send a referral to organisation, service and agencies to receive support Used anonymously for funders 	As Above	As Above	
Home and mobile telephone numbers	<ul style="list-style-type: none"> To communicate appointments/ amend arrangement/ meetings. To contact the client regarding outcome of actions For purpose of making referrals To build case file on client – clog req 	<ul style="list-style-type: none"> Provide to organisations so they can make contact with client Verify client's information. 	As Above	As Above	
Email address	<ul style="list-style-type: none"> If preferred by client 	<ul style="list-style-type: none"> Provide to 	As Above	As Above	

	<ul style="list-style-type: none"> instead of telephone communication • Clients NOK email details for emergencies and correspondence • Avenue to send information alternative to post • To build case file on client 	<ul style="list-style-type: none"> organisations if referrals are made • Use email address to send info to NOK 			
NOK Details or LPA	<ul style="list-style-type: none"> • To be able to contact NOK in a client emergency • Provide information such as services to NOK • Provide update on service being provided • To verify information provided by client • To communicate with NOK so they can help access services for client • Arrange home visit appointments • To gain consent from LPA where no capacity 	<ul style="list-style-type: none"> • To provide to services/organisations etc so that NOK can access support for client directly • Provide to health organisations if there is a medical emergency or accident 	As Above	As Above	NOK details – should we not be recording NOK details if we haven't asked but they have been placed on referral form?
GP Details	<ul style="list-style-type: none"> • To contact GP if concerned about medical health • To arrange appointments • To help with prescription information • To provide to other organisations • To provide to organisations to help access services or make referrals 	<ul style="list-style-type: none"> • To make appointments • Verify information • Request repeat prescriptions • Request for support with medical condition of client • Provide to organisations/services as part of a referral process • Provide to services such as ASC if concerns/safeguarding issues are raised 	As Above	As Above	
Health/Medical Needs	<ul style="list-style-type: none"> • To assess/review support needs and wellbeing • To know clients situation and medical needs for volunteering match • Make referrals and signposting • To ascertain whether client is receiving disability benefits or needs benefits advice • To apply for medical services • Help identify care needs • Part of risk assessment process • To help monitor clients health and wellbeing • To identify accessible transport needs • To identify appropriate services according to health need 	<ul style="list-style-type: none"> • To make referrals for medical services • To make referrals for social care needs • Part of risk assessment process • To support client in the best and most appropriate way • Used anonymously for funders 	As Above	As Above	
Ethnicity and Language	<ul style="list-style-type: none"> • Monitor services • Provide in commissioner 	<ul style="list-style-type: none"> • To assist in making referrals 	As Above	As Above	

	<ul style="list-style-type: none"> monitoring reports - anonymised Used in case studies but anonymised To identify services that are suitable to clients ethnic background/language/culture Make referrals and signposting Help with volunteer match Help to identify language support if needed Provide information in alternative languages To ensure service is meeting diversity 	<ul style="list-style-type: none"> Help with volunteer match Provide to organisations/services as part of their referral process Used anonymously for funders 			
Confirmation that client has consented to referral for service	<ul style="list-style-type: none"> To confirm client knows the referral has been made To confirm client consents referral has been made 	<ul style="list-style-type: none"> Contact with the referrer organisation to check/clarify information To discuss suitability of referral with referrer or explain why not eligible 	As Above	As Above	
Risk Assessment Factors; Contact by telephone Live alone Other visitors Smokes Self neglect Accidental Harm Housebound Environmental Hazards – internal/external Disrepair Hoarding Pets Drug/Alcohol issues Violence/Aggression Abuse/Risk from others Intentional Self Harm Mental Health Issues	<ul style="list-style-type: none"> To complete a thorough Risk assessment for lone and home visiting of staff and volunteers Identify ways in which to provide service to client taking into account risk factors To identify clients support needs Used when making referrals to other agencies and services Create risk plan to ensure delivery of service as much as possible whilst ensuring safety of staff 	<ul style="list-style-type: none"> To make referrals for client where referral form requests risk information Highlight risks to other service providers when making referrals if relevant 	As Above	As Above	
Isolation Indicators; Family visits Friends Visits Day centre Lunch club Neighbours visit Care services Community Centre Other services	<ul style="list-style-type: none"> To check eligibility of referral for the service To ensure that services are not duplicated To check with other organisations level of support/services provided To help prioritise referral Help identify services and organisations for referrals 	<ul style="list-style-type: none"> To assist in making referrals Discuss with organisations services being provided to assist with wellbeing planning Discuss with organisations/service in order to improve service being provided to client 	As Above	As Above	

		<ul style="list-style-type: none"> • Used anonymously for funders 			
Dementia; Diagnosis and Symptoms	<ul style="list-style-type: none"> • To know what stage and form to ensure appropriate support and interaction from staff • To be able to support client in obtaining diagnosis if required • Be aware of clients communication needs in terms of language, visual hearing impairments • To ensure that client is engaged in most appropriate way so that client feels comfortable and confident 	<ul style="list-style-type: none"> • Be able to refer to agencies where diagnosis is part of the criteria • Be able to refer to appropriate agencies for specialist services • Be able to share information to ensure person receives best support when engaging with services • Used anonymously for funders 	As Above	As Above	Dementia; Diagnosis and Symptoms
Reasons for referral	<ul style="list-style-type: none"> • To ensure that client is eligible for the specific service; ie either befriending or wellbeing service • To know what support client needs • Reasons for referral help to identify what services are needed. • Identifies areas that client needs emotional and psychological and practical help and support with • To discuss with client and confirm that these are reasons for engaging 	<ul style="list-style-type: none"> • To ensure agencies are aware of needs and that referral is appropriate • In order to apply for services that are needed for client • To be able to identify services and agencies that can provide supportive role for client 	As Above	As Above	
Client information; Personality Life history Interests/hobbies Past occupation Favourite things Where born What they love doing Cultural background Wellbeing Health and care Likes and interests Relationships Independence What help needed	<ul style="list-style-type: none"> • Collection of this information is asked for due to symptoms of dementia - not all clients are able to recollect or inform of these subjects during assessment • Be able to identify the most appropriate volunteer to meet clients needs • Know what is important to client • Provide a person centred approach in terms of service suggestions and interaction for person • To help make best volunteer match • To make a Keep In Touch postal match so appropriate cards can be sent 	<ul style="list-style-type: none"> • To ensure that external agency has information to help them provide correct support and services • To ensure that client can be treated with dignity and respect by organisation • To ensure other agencies can treat person with dignity and respect • Make best interest decisions if needed • Used anonymously for funders 	As Above	As Above	

	<ul style="list-style-type: none"> • Part of a person centred assessment • To create a wellbeing plan specific to the clients emotional and physical wellbeing 				
Whether person could benefit from service	<ul style="list-style-type: none"> • To ensure and identify that the service is correct approach for client • Ensure that services suggested are appropriate for client • To ensure clients engagement with service • To show any improvement or positive outcomes (distance travelled) • Monitoring purposes • 	<ul style="list-style-type: none"> • To highlight achievements and progress of clients journey • Publicity and promotion of service • To make another referral if the DWB service is unable to assist • Monitoring for commissioners 	As Above	As Above	
Where persons family live and what relationship is like with family	<ul style="list-style-type: none"> • To know what other support the client has outside any statutory and non statutory organisations so any work is not duplicated. • To prompt discussing any support from family or if not appropriate to ask • If there an any risks to be made aware of such as safeguarding • In order to put down as next of kin if appropriate and agreed by client 	<ul style="list-style-type: none"> • To ensure that external agency has information to help them provide correct support and services • To provide to Safeguarding if necessary and appropriate • Used anonymously for funders 	As Above	As Above	
Would person like to attend social grps/clubs	<ul style="list-style-type: none"> • To identify groups/clubs/ services may like to attend and to prompt discussion or to avoid. • To not duplicate any work 	<ul style="list-style-type: none"> • To help make referrals to clubs and groups identified 	As Above	As Above	
Other support person is receiving family, organisations, services	<ul style="list-style-type: none"> • To know what other support the client has outside any statutory and non statutory organisations so any work is not duplicated. • Get a good overview of level of support client has in order to prioritise level of engagement required from service 	<ul style="list-style-type: none"> • Where given consent by person to update other agencies so that they are aware we are working with client • To clarify services being provided are correct and up to date 	As Above	As Above	
Referrers name and contact details	<ul style="list-style-type: none"> • To confirm receipt of referral • To give update to referrer • To clarify any information or to gain contact to obtain further 	<ul style="list-style-type: none"> • Monitoring for commissioners • Used anonymously for funders 	As Above	As Above	

	<ul style="list-style-type: none"> information For monitoring purposes 				
Religious group	<ul style="list-style-type: none"> Monitor services Provide in commissioner monitoring reports - anonymised Used in case studies but anonymised To identify services that are suitable to clients religion Make referrals and signposting Help with volunteer match Help to identify language support if needed Provide information in alternative languages To ensure service is meeting diversity 	<ul style="list-style-type: none"> To assist in making referrals Help with volunteer match Provide to organisations/services as part of their referral process Used anonymously for funders 	As Above	As Above	
Gender	<ul style="list-style-type: none"> Monitor services Provide in commissioner monitoring reports - anonymised Used in case studies but anonymised To identify services that are suitable to clients gender Make referrals and signposting Help with volunteer match To ensure service is meeting diversity 	<ul style="list-style-type: none"> To assist in making referrals Help with volunteer match Provide to organisations/services as part of their referral process where appropriate and with consent Used anonymously for funders 	As Above	As Above	
Sexual orientation	<ul style="list-style-type: none"> Monitor services Provide in commissioner monitoring reports - anonymised Used in case studies but anonymised To identify services that are suitable to clients sexual orientation Make referrals and signposting Help with volunteer match To ensure service is meeting diversity 	<ul style="list-style-type: none"> To assist in making referrals Help with volunteer match Provide to organisations/services as part of their referral process where appropriate and with consent Used anonymously for funders 	As Above	As Above	
Gender reassignment,	<ul style="list-style-type: none"> Monitor services Provide in commissioner monitoring reports - anonymised Used in case studies but anonymised To identify services that are suitable to clients gender reassignment Make referrals and signposting Help with volunteer match To ensure service is meeting diversity 	<ul style="list-style-type: none"> To assist in making referrals Help with volunteer match Provide to organisations/services as part of their referral process where appropriate and with consent Used anonymously for funders 	As Above	As Above	

<p>Is person a carer</p>	<ul style="list-style-type: none"> • Monitor services • Provide in commissioner monitoring reports - anonymised • Used in case studies but anonymised • To identify services that are suitable to clients carer status • Make referrals and signposting • Help with volunteer match • To ensure service is meeting diversity 	<ul style="list-style-type: none"> • To assist in making referrals • Provide to organisations/services as part of their referral process where appropriate and with consent • Used anonymously for funders • Applying for benefits 	<p>As Above</p>	<p>As Above</p>	
<p>Case Note Recording; Volunteer updates; date/time visits/any issues or concerns raised by volunteer, topics covered in conversation, state mind/mood, enjoying visit, is client empowered by visit</p> <p>Case Note Recording Continued; Body language, Clients opinions/choices, Positive aspects of visit, Rapport with volunteer, Client more active motivated, any positive aspects of visit, indicators person enjoyed visit, engaged in activities, communicated wants and needs, showed pleasure, responded to environment, used their remaining abilities, showed emotions, showed sense of purpose, showed self respect, any other benefits from visit,</p>	<ul style="list-style-type: none"> • To provide best type of support and advice to client • To build history of contact with client • To record contact with agencies and services • To record all interaction between volunteers and client • To see if the service has had a beneficial impact on client • Monitoring of befriending relationship 	<ul style="list-style-type: none"> • Used anonymously for case studies • Provide information to outside agencies relevant to any safeguarding • Used to make referrals where appropriate and with clients consent • To ensure that client can be treated with dignity and respect by organisation • To ensure other agencies can treat person with dignity and respect • Make best interest decisions if needed • To be used if needed for capacity assessments • Highlight journey of volunteer match • Highlight benefits of service 	<p>As Above</p>	<p>As Above</p>	
<p>Consent given</p>	<ul style="list-style-type: none"> • To ensure client wants and has agreed to the service 		<p>As Above</p>	<p>As Above</p>	
<p>Type of Housing</p>	<ul style="list-style-type: none"> • Monitor services • Provide in commissioner monitoring reports - 	<ul style="list-style-type: none"> • To assist in making referrals • Provide to 	<p>As Above</p>	<p>As Above</p>	

	<p>anonymised</p> <ul style="list-style-type: none"> • Used in case studies but anonymised • To identify services that are suitable to clients housing status • Make referrals and signposting • To build case file on client – clog req 	<p>organisations/services as part of their referral process where appropriate and with consent</p> <ul style="list-style-type: none"> • Used anonymously for funders 			
Employed/retired	<ul style="list-style-type: none"> • Monitor services • Provide in commissioner monitoring reports - anonymised • Used in case studies but anonymised • To identify services that are suitable to clients employment status • Make referrals and signposting • Help with volunteer match • To ensure service is meeting diversity • To build case file on client – clog req 	<ul style="list-style-type: none"> • To assist in making referrals • Help with volunteer match • Provide to organisations/services as part of their referral process where appropriate and with consent • Used anonymously for funders • Applying for benefits 	As Above	As Above	
Disability	<ul style="list-style-type: none"> • Monitor services • Provide in commissioner monitoring reports - anonymised • Used in case studies but anonymised • To identify services that are suitable to clients disability • Make referrals and signposting • Help with volunteer match • To ensure service is meeting diversity • To build case file on client – clog req 	<ul style="list-style-type: none"> • To assist in making referrals • Help with volunteer match • Provide to organisations/services as part of their referral process where appropriate and with consent • Used anonymously for funders • Applying for benefits 	As Above	As Above	
Emergency info; Doctors telephone No Neighbour Next of Kin Hospital pref Careline Care Agency Sheltered housing Key safe code	<ul style="list-style-type: none"> • To provide to volunteer in case or accident or medical treatment or emergency required • To inform next of kin of emergency • To request GP appointment • To check with care agency on care provision • To gain access to property when person is bed bound • To call Careline in case of accident • To contact sheltered housing for advice 		As Above	As Above	

Preferences for volunteer match	<ul style="list-style-type: none"> • Male or female • Age • Time of visit 		As Above	As Above	
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Signed.....Date.....

Name.....Post.....