

<b>Document Name:</b>	<b>Confidentiality Policy</b>
Approved by Board of Trustees on:	06 September 2018
Review Schedule	Every 2 years
Next review due	September 2020
Owner (Responsibility)	CEO

**Document Description:**

The confidentiality policy sets out the Charity’s practices and procedures on the disclosure of personal information relating to service users. This policy is there to protect the interests of our service users and to ensure that they can have trust and confidence in the Charity and that their dignity is respected. It also protects the Charity, its trustees, staff and volunteers and complies with data protection law.

**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 two years by the Board of Trustees, sooner if legislation, best practice or other circumstances indicate this is necessary.

**Revision History**

Revision date	Summary of Changes	Other Comments

## 1. About this policy

### 1.1. Reasons for this Policy Statement:

- To protect the interests of our service users.
- To ensure all service users 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.

### 1.2. Its meaning

- Staff and volunteers receiving personal information about services users, their carers and families, should treat this information as confidential.
- Under no circumstances should staff and volunteers share personal information with their own partners, family or friends.

## 2. Age UK Wiltshire will seek to ensure that:

2.1. 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, only accessible 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.

2.2. 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:

- keep written and/or computerised records of the service user's personal details and the work done on her/his behalf
- share information with other agencies only under the following circumstances:
  - to ensure the safety and welfare of the service user
    - where such information is relevant to the care arrangements and specific requirements of the service user
    - where such information is required to ensure the safety and welfare of the persons concerned in the care of the service user
    - To protect the safety and welfare of a child or other adult who may be at risk within the household.
- 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.
- Where consent is not given for the Charity to share information externally with 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.
- All information stored in Charitylog will be kept secure and treated as confidential.

- Paper records will be kept in a locked cabinet with restricted access.
- The signed consent form will be stored on the client's record.
- All service users are made aware of their right of access to their records.
- 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.
- Service users will be made aware of their right to complain if they feel confidentiality has been breached.
- Breaches of confidentiality will be dealt with through the Charity's staff and volunteer disciplinary procedures.

### **3. Glossary**

#### **3.1. Personal Information. By personal information we mean both:**

- The data protection definition which is any information which enables a living person to be identified (e.g. 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, e.g. ethnicity, sexual life, political interests, religious beliefs, trade union affiliations etc.
- 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