

Privacy and Confidentiality Policy of the Phoenix Diocesan Council of Phoenix

As stated in the Rule of the Society, “Vincentians serve the poor cheerfully, listening to them and respecting their wishes, helping them to feel and recover their own dignity, for we are all created in God’s image. In the poor, they see the suffering Christ.

Because respect and dignity for the poor are core values of the Society, *members of SVdP observe the utmost confidentiality in the provision of material and other types of support (1.8).*

The Manual of the Society goes on to explain that all individuals receiving services and/or support from Vincentians should be advised of our privacy policy of the conference or council. Because respect for the dignity of each and every person is an integral part of the Society, Vincentians must hold as sacred the stories and information that those we serve share with us.

Confidentiality, based on the individual’s right to privacy, has both legal and ethical implications. Disclosures made to a Vincentian member and Conference by an individual or family may be revealed to others only under specified conditions, and solely for the purpose of providing help (p. 23)

The Confidentiality Policy of the Diocesan Council of Phoenix shall be as follows:

1. All conferences must incorporate into their written conference guidelines statements that determine and define the following items: (See examples)

- a. What information will be recorded. (Record only what is essential to provide quality services.)
- b. Where and how information will be recorded.
- c. How information will be safeguarded.
- d. Who has access to the information.
- e. How long information will be maintained. **(Note - all client records must be retained for at least three years.)**
- f. When and how information shall be disposed of.

2. Information concerning those we serve may be shared without consent only within the Vincentian family. Sharing information outside the Vincentian family must be done with great care and except under extraordinary circumstances only with the consent of those we serve. See list below for appropriate level of consent.

3. Those being served or seeking service and/or support shall be advised of the protocols and privacy policies of the conference/council and how their personal information will be safeguarded and used.

Release of Information Protocol

<u>Type of permission required</u>	<u>Circumstances</u>
Verbal permission:	General types of assistance such as food, thrift store vouchers , referrals or assistance with gasoline or medication purchases.
Case record written consent:	Simple payments for things such as utilities or rent <i>unless the company receiving payment requires a more formal written release.</i>
Formal Release of Information:	Situations that are complicated or require advocacy interactions in which personal information will be shared. Such releases are interaction specific and should apply only to a specific action and limited time frame. (See attached form)
Photo & Media Release Form:	Situations where photos, videos or stories are used for publication. These forms are available through the Community Relations office at Watkins. <i>Media items to be distributed outside of your conference or parish, need to be coordinated through the Community Relations office.</i>
No permission or release:	Situations where the person poses a genuine threat to themselves or others.

Vincentians may not:

- Share personal information about those receiving or seeking service with their own family, friends or persons outside the Vincentian family.
- Release information without informed written consent to any type of media sources.
- Share individual service information with outside agencies or groups such as giving another social service group a list of clients and a record of past services they have received.
- Share information about specific individuals or families receiving service with another individual or family seeking or receiving service.
- Call or notify other groups or agencies about individual service history solely for the purpose of excluding a person from future services.

Examples of written guidelines concerning client information:

Sample 1 – While a variety of notes may be taken during phone conversations and home visits, only basic and pertinent information will be recorded on the client intake and service record/card. All client records shall be placed in a locked file cabinet in the parish office and only active Vincentians will be allowed access to these records. All inactive (old) client records will be shredded after five years where there is no activity,

Sample 2 - Basic and pertinent client information shall be recorded in the conference computer system and all files shall be backed up to a secure system once every three months. The conference computer will be password protected and shall be secured in a locked file cabinet at the parish office or personally secured by the Vincentian on-call. All inactive files, files where there is no activity for a period of 3 or more years, shall be purged from the computer. Receipts for payment and copies of Consent forms shall be placed in the conference's locked file cabinet or secured in the Treasurer's records.

Sample 3 -

1. All client files and records shall be secured in the SVdP Food pantry and only active, authorized Vincentians shall have access to these records.
2. Only basic client and service information shall be recorded.
3. All inactive files shall be shredded after five years of inactivity.
4. All minutes and other conference documents containing client information must be secured or shredded by conference members.

