

# **Charleston Area Senior Citizen's Services, Inc.**

## **Confidentiality Agreement**

I, \_\_\_\_\_(printed name), agrees to maintain the complete confidentiality of all employee and/or participant records in accordance with Charleston Area Senior Citizen's Services, Inc. Policies and Procedures.

It is the policy of Charleston Area Senior Citizen's Services, Inc. (herein referred to as "CASCS") that Board members, volunteers, employees and vendors/contractors of the CASCS may not disclose, divulge, or make accessible confidential information belonging to, or obtained through their affiliation with the CASCS to any person, including relatives, friends and businesses and professional associates, other than to persons who have a legitimate need for such information and to whom the CASCS has authorized disclosure.

This policy is not intended to prevent disclosure where disclosure is required by law. Board members, employees, volunteers and vendors/contractors must exercise good judgement and care at all times to avoid unauthorized or improper disclosures of confidential information. Conversations in public places, such as restaurants, elevators, public transportation and or social media, should be limited to matters that do not pertain to information of a sensitive or confidential nature.

### **Internally**

1. Participant information must be contained in a locked file cabinet or desk when not being utilized by staff. Staff should refrain from leaving confidential information on desks or otherwise in plain view.
2. No participant information may be removed from the building except during emergency evacuations.
3. CASCS will provide Lock Boxes for all staff that complete in-home participant assessments. In-home participant assessments must be kept in a Lock Box after completion and returned to the main office within 24 hours of completion.
4. Participant information that is no longer needed must be shredded or destroyed by designated CASCS Finance Staff. Participant information should never be discarded in the trash. No records or lists will be maintained where they may be seen or read by other people we serve, volunteers or members of the community.
5. Staff, whether administrative or professional personnel, will have access to such records on a need-to-know basis only.
6. Staff should refrain from the use of speaker phones to discuss confidential information, "Gossip Sessions," and other non-professional discussions about individuals and records, by staff are strictly forbidden.
7. One-on-one meetings with program participants should be held in an office or in one of the CASCS conference rooms, where the door can be closed for privacy.
8. Confidential information entered into the CASCS data system must be limited to spreadsheets containing the clients' names, telephone numbers and addresses. No other personal information may be entered. Foster Grandparent and Senior Companion client and volunteer information will be maintained in Volunteer Reporter. Ansonborough House resident information will be maintained in TRACS. Title III and state funded client information will be maintained in AIM.

\_\_\_\_Please Initial

## Externally

Employment verification will only be given upon the consent of the individual employee. The Executive Director or Finance Director are the only two individuals authorized to release employment verification. Only the position name and dates of employment will be released.

Program participants must provide consent to release information forms in order for CASCs staff to coordinate services. Consent to Release Information Forms will be fully explained and completed in the presence of the person for obtaining or releasing of information about the person on a need-to-know basis only.

It is especially important when handling request over the telephone to ascertain the identity of the caller. Even when the Consent to Release form has been obtained, a signed request on appropriate letterhead from the entity making the inquiry should be obtained before releasing the information.

Any requests for specific identifying information, such as social security numbers, dates of birth, etc. regarding an employee or a client, including request made by state or federal authorities, must be referred to the Executive or Finance Directors for handling.

If, for any reason, records are to be inspected by any outside entity, the individual(s) inspecting the records must be specifically authorized to do so by the Executive or Finance Director. The taking of notes, copying of records, or removal of records is specifically prohibited in such cases.

Staff will not discuss any individual's record with unauthorized individuals, formally or informally, whether on or off duty.

Upon termination with the CASCs, Board members, employees, volunteers or vendors/contractors shall return all documents, papers and other materials that may contain or be derived from confidential information in his or her possession.

Board members, employees, volunteers and vendors/contractors will sign CASCs Confidentiality Policy at the time employment or volunteer affiliation with the CASCs begins.

Furthermore, I understand that if I fail to comply with the policy regarding confidentiality, I will be subject to disciplinary action up to including termination of employment or volunteer activities.

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**Volunteer Name Printed**

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**Today's Date**

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**Volunteer Signature**

(Parent or guardian if volunteer is under 18 years of age.)

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**Volunteer Coordinator**

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**CASCs Witness**

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**Today's Date**

Please return to Volunteer Coordinator, Charleston Area Senior Citizen's Services, Inc. 259 Meeting Street, Charleston SC 29401 [www.CharlestonAreaSeniors.com](http://www.CharlestonAreaSeniors.com) 843-722-4127 VolunteerCord@CharlestonAreaSeniors.com

