

Confidentiality Policy

March 2013

(a) Confidentiality Statement

- All branches of WKDA are committed to providing a confidential advice service to its users.
- WKDA believes that principles of confidentiality must be integrated across all aspects of services and management.
- WKDA believes its users deserve the right to confidentiality to protect their interests and safeguard WKDA's services.
- "The Manager" is responsible for the day to day running of WKDA and is based in Tonbridge at WKDA's offices at the Tonbridge Baptist Church.
- The "Duty Manager" or "Senior Adviser" is the person nominated to take charge of each advice session.

(b) Definition of Confidentiality

- WKDA understands confidentiality to mean that no information regarding a service user shall be given directly or indirectly to any third party outside of the organisation, without that service user's prior consent.
- WKDA recognises that all users should be able to access its services in confidence and that no other person should ever know that they have used WKDA's services without their consent in writing.
- WKDA recognises that information may be indirectly given out through the Manager, staff or volunteers informally discussing cases. They should ensure that no discussions relating to an individual user of WKDA can take place outside of any WKDA premises.
- WKDA recognises that users need to feel secure in using the services in a confidential manner and so therefore all users are afforded confidential interview space (if it is required) and will ensure mechanisms are used to ensure no breach of confidentiality can occur inadvertently.
- WKDA will not confirm the user's presence in any of its premises or use of its premises without obtaining the user's consent.

(c) Statistical Recording

- WKDA is committed to effective statistical recording of service users to enable monitoring of the take-up of service and to identify any policy issues arising from advice services.
- It is the Manager's responsibility to ensure all statistical records given to third parties, such as to support funding applications, monitoring reports for the local authority etc. shall be produced in anonymous form, so individuals cannot be recognised.

(d) Manager, staff and volunteer records

- Except to meet our legal obligations e.g. to Companies House and the Charity Commission, the names and contact details of all of the above are treated as confidential and will not be disclosed to anyone outside of WKDA.

(e) Electronic Case Records

- It is the responsibility of the Manager, staff and volunteers to keep all passwords issued by WKDA secure, and not to share them with any other person (within the organisation or without), except when resolving IT issues or in discussion with the Manager e.g. a password reset request.
- If the Manager, staff or volunteers wish to access electronic files away from WKDA premises using their own computer or electronic device, it is their responsibility to ensure that the device is running up to date security software at all times. Free, public or unknown Wi-Fi services should not be used neither should third party electronic devices.
- If any device which they use is shared with other people then the Manager, staff or volunteer must not, in any way, store any passwords connected with software relating to WKDA on the machine, and they must never leave the machine unattended while logged into any such software.

(f) Paper Case Records

- It is the responsibility of the Manager/Duty Manager/Senior Adviser to ensure all case records are kept in locked filing cabinets at their Centres. All case records must be locked away at the end of each working day. All information relating to service users will be left in locked drawers. This includes note books, copies of correspondence, calculation sheets and any other sources of information.
- Where it is necessary to take paper files away from WKDA premises these must be looked after carefully and kept secure at all times.

(g) Expressed Consent to Give Information

- It is the responsibility of all staff and volunteers to ensure that where any action is agreed to be taken by WKDA on behalf of a client, that client must firstly sign an authorisation form. This will be placed on the client's file.
- WKDA's staff and volunteers are responsible for checking with clients if it is acceptable to call them at home or work in relation to their case. All calls must make no reference to WKDA when making telephone contact with clients.
- WKDA's staff and volunteers are responsible for checking with clients that it is acceptable to write to them at home or work in relation to their case. All details of expressed consent must be recorded within AdvicePro.

(h) Breaches of Confidentiality

- WKDA recognises that occasions may arise where a member of staff or a volunteer feel they need to breach confidentiality. WKDA recognises, however, that any breach of confidentiality may damage the reputation of WKDA's services and therefore has to be treated with the most serious of approaches.
- On occasions where an individual feels confidentiality should be breached the following steps must be taken:
 - They should raise the matter immediately with the Manager or their designated deputy at Tonbridge.
 - They must discuss with the Manager the issues involved in the case and explain why they feel confidentiality should be breached and what would be achieved by breaching confidentiality. The Manager should take a written note of the discussion.

West Kent Debt Advice

c/o Tonbridge Baptist Church, Darenth Avenue, Tonbridge, Kent, TN10 3HZ

Tel: 01732 300425 (24 hour answerphone) Fax 01732 369453

website: www.wkda.org.uk e-mail: advice@wkda.org.uk

Registered Charity No. 1125756

- The Manager is responsible for discussing with them what options are available in each set of circumstances.
- The Manager is responsible for making a decision on whether confidentiality should be breached. If they decide that confidentiality is to be breached then they should take the following steps:
- The Manager should consult with the Executive Chair of the Trustees or their designated deputy and brief them on the full facts of the case, ensuring they do not breach confidentiality in doing so.
- If agreement is given to breaching confidentiality, a full written report on the case should be made and any action agreed undertaken. These are to be retained at the Tonbridge office.
- If there is no agreement to breaching confidentiality then this is the final decision of the organisation.
- In no circumstances should any breach of confidentiality be discussed at this stage with the WKDA Complaints Officer. This is to ensure that any further complaints or investigations arising from breach in confidentiality can be carried out in an independent manner.

(i) Legislative Framework

- The WKDA will monitor this policy to ensure it meets statutory and legal requirements including the Data Protection Act, Children's Act, Rehabilitation of Offenders Act and Prevention of Terrorism Act.

(j) Ensuring the Effectiveness of the Policy

- All management team members, staff and volunteers will receive a copy of the Confidentiality Policy each time it is revised.
- New staff and volunteers will be introduced to the confidentiality policy via induction and training.
- The policy will be reviewed regularly and amendments should be proposed and agreed by the Board of Trustees.

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