

PATHWAYS ABILITIES SOCIETY

PROCEDURE: CONFIDENTIALITY AND RELEASE OF PERSONAL INFORMATION

Applies to: All Personnel and Volunteers

Original Effective Date: 1993

Effective Date: July 10, 2023

Replaces Procedure Dated: February 14, 2022

Person's Served

1. The Community Placement Developer (CPD) or designate provides new referrals and/or their designate with a Community Support and Consent form to read and sign prior to completing the Pathways Abilities Society application form.
2. The CPD or designate ensures the Community Support and Consent form is read and signed annually.
3. Information regarding a person served is only released to those who need to know and with prior approval from the supervisor.

Employees

1. The executive director or designate provides new employees with a Confidentiality Statement and Use of Confidential Material Off-Site Agreement Statement form to read and sign upon hire.
2. Employees electronically sign the Confidentiality Statement and Use of Confidential Material Off-Site Agreement Statement annually thereafter in January at their evaluation. The original document is kept in their employee file.
3. New employees complete the CLBC online privacy training.

Volunteers

1. The executive director or designate provides new volunteers with a Confidentiality Statement and Use of Confidential Material Off-Site Agreement Statement form to read and sign upon hire.
2. Volunteers sign the Confidentiality Statement and Use of Confidential Material Off-Site Agreement Statement annually thereafter in March.
3. New volunteers complete the CLBC-On-line privacy training if they access files of individuals served in the course of their duties.

Requests for Information

1. When confidential information is requested from employees/volunteers, they state they are not authorized to release any information concerning an individual or the society's affairs and refer the person requesting the information to the executive director or designate.

2. Information requests from newspapers and other public news organizations are referred to as stated in the Media policy.
3. The executive director or designate ensures that prior to releasing confidential individual information, the person or their designate has signed the Consent for Release form allowing for the release of the requested information.
4. Information about individuals may be released on a strictly need-to-know basis to family members who inquire when the person cannot properly inform the family and such action is in the person's best interest and with prior approval from the supervisor.

Taking Confidential Information Off Site

1. Employees who need to take confidential information off-site are required to adhere to the Confidentiality and the Borrowing Equipment, Material and Vehicles policies and complete the Borrowing Equipment/ Materials Terms form.
2. Employees must return confidential information to their secured location, which is confirmed by their immediate supervisor.

Employment and Volunteer References

1. An employee/volunteer wanting to use Pathways as a reference, contact their immediate supervisor, who completes a Pathways Abilities Society Employment Reference-Internal form.
2. The supervisor:
 - Reviews the completed form with the People and Culture Manager or the Executive Director.
 - Then contacts the employee or volunteer to review and present the form.
3. The employee signs the completed form confirming they agree with the employment reference summary.
4. The supervisor gives the completed form to the executive director. They do not give the person a copy of the completed form.
5. The employee/volunteer instructs the person requiring the reference to contact the executive director. The information provided on the form is the only information that will be released.
6. When a request for the release of information is received, and the employee/volunteer has not authorized the employer to release the information, Pathways will respond to the inquirer with a statement that it is not the organization's policy to give out information without the employee's prior approval.

Employment and Volunteer reference post-secondary programs or educational opportunities

1. An employee or volunteer wanting to use Pathways as a reference to support their application to a post-secondary education program contacts the manager responsible for volunteers.

2. The manager or designate:

- Completes the documentation required.
- Obtains approval from the executive director.
- Makes a copy and provides the executive or designate with a copy for their file.
- Releases the information.

References for Home Share Contractors

1. A home share contractor wanting to use Pathways as a reference must have the home share manager complete the Pathways Abilities Society External Reference for Home Share Contractor form and sign confirming they agree with the reference summary.

2. The home share manager gives the completed form to the executive director.

3. The home share contractor instructs the person requiring the reference to contact the executive director. The information provided on the form is the only information that will be released.

4. When a request for the release of information is received, and the home share contractor has not authorized the employer to release the information, Pathways will respond to the inquirer with a statement that it is not the organization's policy to give out information without the contractor's prior approval.

Violation of Policy

1. Employees or volunteers perceiving or witnessing a violation of the Confidentiality and Release of Information policy will utilize the Conflict Resolution policy and procedures.