

Saffron Walden



CONFIDENTIALITY POLICY & PROCEDURE

This policy and procedure has been adopted by Saffron Walden Mencap Society through its Trustees Committee which remains responsible for its review.

Original signed version is kept at the SWMS Registered office.

Signed: *Patrick Draper* Date: 22nd May 2023

Chair of Trustees

Record of review of this policy and procedure: -

Reviewed: May 2023

Next review: May 2027

CONFIDENTIALITY POLICY AND PROCEDURE

1. Purpose

Respecting the privacy of our members, staff, volunteers, supporters, is a basic value of Saffron Walden Mencap Society. Personal and financial information is confidential and should not be disclosed or discussed with anyone without permission or authorisation from the Chair of Trustees. Care shall also be taken to ensure that unauthorised individuals do not overhear any discussion of confidential information and that documents containing confidential information are not left in the open or inadvertently shared.

Reference to be read in conjunction with Saffron Walden Mencap Society's IT policy and Privacy notice.

This policy applies to employee, volunteers, and sub-contractors, in hereafter referred to as staff, it does not form part of the terms and conditions of employment and might be varied from time to time.

2 Scope

Unauthorised disclosure of confidential or privileged information is a serious violation of this policy and will subject the person(s) who made the unauthorised disclosure to appropriate disciplinary action which may result in the termination of their employment.

3 Your Responsibilities

You must contact your line manager or the Chair of Saffron Walden Mencap Society if you have any concerns that you have breached our confidentiality policy.

4 Confidentiality Procedures

4a Personal Information

Personal information, whether in hard or soft copy form, for example, names and contact details of members and details of their needs, should only be accessed by staff to the extent necessary for the performance of their duties in working with Saffron Walden Mencap Society. Personal information, whether in hard or soft copy form, should not be held by any staff member, save to the extent necessary for the carrying out of business or activities for Saffron Walden Mencap Society in a lawful, proper and efficient manner. Personal information so held is the responsibility of the individual holding it. Personal information, whether in hard or soft copy form, should not be left unattended or visible in a public place when in use and must be stored securely when not in use. They should be stored in a place and manner such that they cannot be accidentally moved or mistakenly taken by others. Any loss of personal information or suspected loss of information, in whatever form, must be reported as soon as practicable to your Line Manager or in their absence the Chair of Saffron Walden Mencap Society. Personal information, in whatever form, must not be disclosed to anyone outside save as referred to below.

4b Financial information

Financial information, whether in hard or soft copy form, should only be accessed by staff to the extent necessary for the performance of their duties in working with Saffron Walden Mencap Society.

Financial information, whether in hard or soft copy form, should not be held by any staff member, save to the extent necessary for the carrying out of business or activities in a lawful, proper, and efficient manner. Financial information so held is the responsibility of the individual holding it. Financial information, whether in hard or soft copy form and wherever held, should not be left unattended when in use and must be stored securely when not in use.

Any loss of financial information, in whatever form, must be reported as soon as practicable to your Line Manager or the Chair of Saffron Walden Mencap Society. Financial information, in whatever form, must not be disclosed to anyone outside Saffron Walden Mencap Society save as referred to below.

4c Sensitive information

Sensitive information, whether in hard or soft copy form, should only be accessed by staff to the extent necessary for the performance of their duties in working with Saffron Walden Mencap Society. Sensitive information, whether in hard or soft copy form, should not be held by any staff member, save to the extent necessary for the carrying out of business or activities for Saffron Walden Mencap Society in a lawful, proper and efficient manner. Sensitive information so held is the responsibility of the individual holding it. Sensitive information, whether in hard or soft copy form and wherever held, should not be left unattended or visible in a public place when in use and must be stored securely when not in use. Sensitive information should be stored in a place and manner such that this cannot be accidentally moved or mistakenly taken by others. There should be a secure cupboard or drawer at each setting which can be locked or otherwise safely protected. Any loss of sensitive information, in whatever form, must be reported as soon as practicable to your Line Manager or the Chair of Saffron Walden Mencap Society. Sensitive information, in whatever form, must not be disclosed to anyone outside of Saffron Walden Mencap Society save as referred to below. Personal information must not be disclosed outside of Saffron Walden Mencap Society unless those to whom it relates gives their consent for its use for the specific purpose concerned, or unless its disclosure is required by law or another regulatory requirement. Financial information must not be disclosed outside Saffron Walden Mencap Society, without the consent of the Treasurer or the Chair of Trustees or as required by law or other regulatory requirements. Sensitive information must not be disclosed outside Saffron Walden Mencap Society unless those to whom it relates give their consent for the specific purpose concerned or its disclosure is required by law or other regulatory requirements and see further on sensitive information below.

4d Sharing sensitive information.

In the context of safeguarding children and safeguarding vulnerable adults from abuse, sensitive information may need to be shared as provided for in: Saffron Walden Mencap Society Child and Adult at Risk Protection Policy and Procedure. Staff should refer to the relevant policy and procedure if they feel sensitive information needs to be shared in any given case. In any event, save in cases of emergency, staff must refer to the nominated Safeguarding Leads for guidance. To avoid casual disclosure of information all staff/volunteers are required to take all reasonable measures to ensure that: • when using any personal information, financial information or sensitive information, in whatever form and in whatever circumstances, such information is not seen by any person who is not authorised to see it, and • when discussing any personal information, financial information or sensitive information, in whatever circumstances, such information is not heard by any person who is not authorised to hear it.

5 Return of all documentary information

All documentary information, whether in hard or soft copy form, given to or acquired or created by any staff member during and relating to their working with Saffron Walden Mencap Society must be returned to their Line Manager or the Chair of Saffron Walden Mencap Society at the end of the working relationship.

6 Staff process for breach of personal data

All breaches, however, small must be reported to the Chair of Saffron Walden Mencap Society. Please refer to section 3. All breaches will be recorded in line with Government Data Protection Regulations.