

Confidentiality Statement

Citizens Advice Shropshire (CAS) is responsible for the policies and procedures which govern the operation of the Shropshire Information, Advice & Support Service (IASS). IASS will adhere to CAS policies. IASS guidelines and statements are intended to supplement and complement CAS Policies.

1. Purpose

1.1 To ensure that parents and carers of children with Special Educational Needs and/or Disabilities (SEND), and young people themselves (age 16 – 25) with SEND are able to access Information, Advice and Support via the Information, Advice & Support Service (IASS) with confidence.

1.2 Unless the parent/carer/young person (hereafter called “Client”) has given explicit consent for information to be shared, no personal data or records (including whether or not the Client has contacted the IASS) will be shared with anyone outside the Citizens Advice service unless there is a legal obligation to disclose information to statutory services, for example:

- there are concerns that a child or parent may be at risk of serious harm or abuse - child protection / safeguarding (This will be made clear to Clients routinely at the beginning of their contact with the service)
- there are strong public interest reasons such as concerns around terrorism.

1.3 All IASS staff have a duty to safeguard confidential information.

2. Legislation

All information will be held, processed and shared in line with relevant legislation, principally the Data Protection Act 2018 (DPA 2018) and General Data Protection Regulation 2018 (GDPR).

3. Training and Awareness

All IASS staff is given a copy of the IASS Confidentiality Statement and must read the CAS Confidentiality policy during induction. During the first 2 weeks of employment all staff undertakes online Information Assurance training and this is updated in line with CAS schedule.

4. Client Records

4.1 Shropshire IASS welcomes self-referrals and also accepts appropriate referrals from other agencies providing the Client is present with them at the time of referral.

4.2 IASS may seek permission from a Client to access information from other parties in order to build a background of the case in order to provide the best support possible. This verbal permission will be recorded in the Client's notes.

4.3 Client referral forms are completed on referral and these will normally include names, addresses and phone numbers. However, where a Client wishes to remain anonymous, IASS will still endeavour to provide appropriate information, advice and support although the service may necessarily have to be limited.

4.4 Any written client records or any other confidential information such as contact details, notes from meetings and discussions and any correspondence, will be kept securely within the CAS office. This is an area that does not allow access by unauthorised persons. Security passwords are not disclosed to unauthorised persons. When emailing, sensitive files are encrypted or password protected.

4.5 The Client's case notes are available to be shared with the client on request. Paper records are retained for as long as involvement is active then scanned to the Citizens Advice secure record storage on closure of the enquiry or case. Paper documentation is disposed of confidentially.

4.6 Written records will not contain any sensitive material which does not have direct relevance to the support being offered. Case notes will not include information about other family members, friends, neighbours or other children unless directly relevant.

4.7 Where data is supplied for benchmarking and reporting purposes, this will be provided in a format that ensures individuals are not identifiable.

5. Meetings and Telephone Calls

5.1 IASS staff are aware of the need for confidentiality when making and receiving telephone calls.

5.2 Meetings must be held at suitable venues where a confidential conversation can take place e.g. LA offices, school. A confidential meeting space can be arranged by the IASS when required.

5.3 Locations and times of meetings are shared as part of lone working arrangements, but this does not include other client information.

5.4 Clients must be made aware at group events that IASS cannot guarantee confidentiality by people other than IASS employees.

6. Review

These guidelines will be reviewed by CAS in line with CAS policy review schedule or following publication of advice from IASS Network, whichever is earlier.