

# **Topsham Surgery Patient Participation Group**

## **Confidentiality Policy and Declaration Agreement for Volunteers**

### **1. Introduction**

This policy shall apply to all volunteer members of the Patient Participation Group (PPG).

Volunteers shall normally be considered to be those individuals who are not bound to the practice by contract of employment or any other form of contract. Practice staff who have, at any moment in time, responsibility for the conduct and discipline of volunteers within the bounds of the practice shall be required to comply with this policy in relation to ensuring confidentiality awareness in any situation which may arise.

### **2. Confidentiality**

- a) All information held at the practice about patients is deemed confidential whether held electronically or in hard copy.
- b) All information about the practice, including financial and staff records, is also deemed confidential whether held electronically or in hard copy.
- c) Volunteers should not have direct access to confidential information held by the practice. This includes any information concerning an identifiable patient (or a patient who could potentially be identified on the basis of the confidential information). Access to any such information is only permissible with the written authorisation of the patient concerned or their authorised representative.
- d) If during the course of his or her activities within the surgery a volunteer overhears or otherwise comes by confidential information, the facts will, as soon as is reasonably practicable, be referred to the Practice Manager or other authorised person within the practice and that information will not be disclosed to any other person.
- e) If a situation arises where a patient contacts the PPG member directly, the code of conduct and confidentiality agreement must be adhered to.

### **3. Definitions**

For the purpose of this policy the definitions of the following key words shall apply:

- *Confidential*: something that is intended to be kept secret, classified, restricted or suppressed; something that is personal, private and trusted.
- *Safeguarding*: protecting the safety and welfare of vulnerable individuals such as children and young people and those with a learning or mental or intellectual impairment.

#### **4. Policy – Induction of Volunteers**

- At the point of being accepted as a prospective volunteer, an authorised member of practice staff shall brief the volunteer on the contents of this Confidentiality Policy and of its paramount importance to the business of the practice, staff and patients alike.
- Prior to commencing any authorised activity or duties within the practice, an authorised member of practice staff shall also ensure that the volunteer has read and understood the document titled 'Guidelines for Volunteers - Confidentiality' (below) and is aware of their safeguarding obligations.
- The authorised member of the practice shall then ensure that the volunteer is committed to complying with this policy and also with the Confidentiality Guidelines and is advised of the disciplinary consequence of failing to do so. Breaking the Data Protection Act could have legal implications and would mean that the volunteer could no longer continue in that role.
- A volunteer and PPG member who satisfies the preceding elements of this policy shall then be invited to sign a declaration in the presence of the authorised member of practice staff.

#### **5. Responsibilities**

- Any safeguarding issue must be reported immediately to the Practice Manager.
- All information relating to practice staff and patients shall be considered confidential at all times. This information may be spoken, documented, or electronically stored, transmitted or displayed on any kind of electronic device.
- All information relating to a patient's identity, presence at and/or reason for visiting the practice, even within the physical boundaries of the practice (including any area occupied by an associated activity, for example, a pharmacy) is equally confidential. This extends to the identity of anyone accompanying the patient at the time of said visit.
- Any unauthorised disclosure is a breach of confidentiality and may be regarded as an absolute disqualification from volunteer status.

### **Guidelines for Volunteers – Confidentiality**

1. Discuss your activities with an authorised member of practice staff on a “need to know” basis.
2. Such discussions should be discreet and in private.
3. Oral reporting of your activities should be conducted in private (e.g., with the Group Chair/Practice Lead) or, when it is a part of discussion at public meetings, you should have due regard for discretion and confidentiality.
4. When requesting information from a patient in the Patient Waiting Room, such conversation should be conducted as quietly and discreetly as possible with voices directed away from others who might hear.
5. Where it is easier for the patient to fill in a questionnaire or form they should be invited to do so, but vigilance is then required to ensure that their feedback is not seen by others or lost.
6. Questionnaires, or other forms, completed in the Patient Waiting Room or elsewhere and containing personal details shall be confidential and shall remain in the custody of the volunteer until handed over to the designated member of staff for that activity.
7. When using a phone or other electronic device, make sure that any other conversations within the practice cannot be accidentally transmitted at the same time.
8. During authorised use of computer systems, always ensure that all access codes and passwords are safeguarded.
9. When responsible for a Personal Computer (PC) terminal or Visual Display Unit (VDU) screen, always ensure that the screen is only visible to you, the user. Where necessary, isolate the PC terminal or VDU screen by shutting and locking any access doors. Always log off before leaving the PC/VDU unattended.
10. Always ensure that paper waste containing confidential information is completely cleared away and disposed of safely by shredding on site.
11. Always ensure that any computer accessories you need are owned and screened by the practice prior to use. Privately owned devices must not be used.
12. Do not use practice equipment for own use.

#### **Volunteers shall not:**

- Behave contrary to the preceding guidelines/ best practice.
- Disclose confidential information to any unauthorised persons.
- Copy confidential information for any unauthorised use or reason.
- Remove confidential information from the practice premises.
- Take custody of confidential information when not authorised to do so.

### **Declaration Agreement for PPG members**

I have read and understood the Confidentiality Policy and Declaration Agreement for PPG members.

I confirm that I have been briefed by an authorised member of practice staff and have had the opportunity to ask any clarifying questions.

I also confirm that I understand the specific content and nature of **Paragraph 5.0** of the Confidentiality Policy and have discussed and received a copy of 'Guidelines for PPG members - Confidentiality' for my own use.

I undertake to always be aware of the nature and importance of confidentiality and understand that the consequence of any breach associated to me may mean the termination of my PPG member status within the practice, and may be subject to further action by the practice.

**Name:**..... **Signature:**.....

**Date:**.....

### **Declaration by the authorised member conducting the briefing**

I confirm that I have briefed this PPG member in accordance with the Confidentiality Policy and Declaration Agreement for Volunteers.

**Name:**..... **Signature:**.....

**Role:**..... **Date:**.....