Alzheimer Society
BRITISH COLUMBIA

Privacy Guidelines for Programs & Services Statistics Forms

Alzheimer Society of B.C. (ASBC) staff and volunteers have the responsibility to safeguard clients' personal information collected by the ASBC.

Statistics forms that contain clients' personal information should be kept in a locked cabinet at the Resource Centre. However, in the event that a form containing this type of information leaves the Resource Centre (e.g. volunteer needs to be the custodian of the statistics form), the following guidelines apply:

1. Record Relevant Comments

- Any notes kept about participants on statistics forms should be for the purposes of managing the service provided (support group, education event, or Minds in Motion program).
- Do not keep notes about the person's situation.
- Notes should be brief and administrative in nature (e.g. *prefers a call in the afternoon*, *second phone number is..*, *away on vacation*).

2. Keep Information Secure

- Only keep statistics forms for a three month period (one quarter).
- Do not leave statistics forms in a vulnerable and insecure place (e.g. car, kitchen counter, satchel that is hung in public place).

How to Handle Hard Copy (Paper) Statistics Forms

- Keep statistics forms in the **plastic folder** provided by ASBC. When you are using the form, please ensure the side with client information is placed faced down when not actively in use to ensure the information stays out of view of others around you. For example, when taking attendance at a support group or education event, place the page face down or cover with a blank sheet of paper when you are done checking off a name. Do not leave the page with client information face up while waiting for all participants to arrive.
- Volunteers: as soon as you have received confirmation from the Resource Centre that they have received your submitted statistic forms, shred any remaining copies that you may have in your possession. If you do not have access to a shredder, please coordinate with your staff supervisor to mail in or drop off the forms at your resource centre.

How to Handle Electronic Statistics Forms

- Statistics forms that are shared via e-mail must be password protected [1]
  - Recommended password formula: **asbc** + **area number**

[1] To learn more about protecting your stat forms, click on the following link to see "Set a Password in an Excel Spreadsheet": *http://office.microsoft.com/en-ca/help/password-protect-documents-workbooks-and-presentations-HA010148333.aspx*

- Volunteers: keep the password protected statistics forms in a separate ASBC folder on your home computer
- Volunteers: as soon as you have received confirmation from the Resource Centre that they have received your submitted statistic forms, delete any copies of the forms that are saved on your computer (including Recycling Bin), as well as any related e-mail correspondence (Inbox and Sent Folder)

3. Maintain Confidentiality

- All personal and identifying information about participants must be kept confidential.
- Staff and volunteers must not discuss clients' situations with others.
  - ***Exception:*** For purposes of debriefing, consultation and problem-solving, staff and volunteers may discuss individual or group situations with their staff supervisor. For more information, refer to the *Confidentiality and its Limits / Reporting Abuse and Neglect (June 2010)* document available on the Support Volunteer Resources section of our website.

List of forms that these guidelines apply to:

- Support Group Attendance Forms
- Education or Minds in Motion Attendance Forms
- Evaluation forms for education events
- Keeping in Touch forms (KITs)
- If possible, the Attendance Forms provided by a third party (e.g. community centres for Minds in Motion)
  - ***Note:*** The forms listed above are the only sources of personal information that volunteers are permitted to keep outside the Resource Centre.