

SURREY

Services for Seniors

Confidentiality Statement

Surrey Services for Seniors and its employees and volunteers have an ethical and legal obligation to respect the privacy of the organization's clients and employees and to protect and maintain the confidentiality of all information learned about clients, employees, family members and friends in the course of providing services.

1. Client and employee records are legally protected, confidential records and must be treated as such. This means that client and employee records maintained by Surrey Services for Seniors must be kept in locked file cabinets at all times, except when being reviewed or supplemented by an authorized employee. Client and employee records that are kept in electronic format shall be password protected with the password given only to authorized personnel. Client and employee records should never leave the office.

2. Client records, client-related business (including the names of clients) and employee information should not be discussed with or disclosed to anyone except the following: co-workers who are specifically authorized to have access to such information; or; any person authorized by the client to obtain information about the client (any such authorization must be in writing in a form approved by the president and must be retained in the client file) or employee; or any person with whom the president has been authorized to share the information. It is illegal and unethical to discuss client or employee matters with friends, spouse, relatives or anyone else, except those persons listed above, unless ordered to do so by a court or otherwise required to do so by law. If someone is insisting on obtaining information about a client or employee, but the client or employee has not authorized the disclosure, refer the matter to the president.

3. Violations of the Surrey Services for Seniors' Confidentiality Policy are considered very serious and may result in disciplinary action, up to and including termination.

Confidential Reporting of Ethics Concerns

Surrey Services is committed to the highest standards of ethical conduct in its financial affairs and reporting. In accordance with applicable law, persons who in good faith report evidence of known or suspected fraud, theft, accounting or auditing improprieties or other financial misconduct will not be retaliated against because of such reports.

1. Evidence of known or suspected fraud, theft, accounting or auditing improprieties or other financial misconduct involving Surrey Services assets, operations or employees should be reported to the President or the Chairperson of the Finance Committee of the Board of Directors. All communications may be made anonymously. If warranted after investigation, any such instances will be referred to the Surrey Board of Directors for appropriate action.