

Board Governance Privacy Policy

Title	Privacy Policy	Policy No.	GOV1.13
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Scope of Policy:

This policy sets out the principles that will be observed by CMHA-Vernon concerning the collection, use, and disclosure of information about any identifiable individual who is a consumer of CMHA-Vernon. If the personal information of a consumer is made anonymous by removing details so that the individual is not identifiable to the user or recipient of that information, it is not governed by this Policy but will still be treated with appropriate safeguards.

Policy:

CMHA – Vernon is committed to collecting, using, and disclosing personal information in a manner that complies with all applicable laws.

CMHA -Vernon Services

includes, but is not limited to, providing advocacy, support, education, psychosocial rehabilitation, Disordered Eating support and counseling, supported work, housing, and/or facility care to individuals with a mental illness.

Consumer refers to a person who uses or applies to use, CMHA – Vernon services.

Collect (personal information): To gather, receive or obtain personal information from any source outside CMHA Vernon, by any means.

Personal Information

Any information about an identifiable consumer and including, but not limited to, the individual consumer's name, birth date, birthplace, languages, gender, address, identification numbers, financial status (income, employment, assets, liabilities, source of funds), personal references, medical and mental health records, drug and alcohol history, mental, emotional and cultural needs, legal situation, history of suffering abuse (if any), particulars of relatives (parents, siblings, children, spouse, caregivers), immigration status, particulars of income assistance, travel or movement details, lifestyle, leisure activities, court/ tribunal/ inquiry proceedings, qualifications and skills, student records, work history, physical description, habits, personality, character, marital history, and all factors leading to need for food, shelter, clothing, or counseling. In addition, it includes all personal information about the consumer collected as a result of the provision of CMHA Vernon services to the consumer.

With respect to any specific individual, CMHA -Vernon may or may not collect, use, or disclose client personal information within these enumerated categories.

Third-party

Someone other than CMHA -Vernon, an employee of CMHA -Vernon, or a volunteer working with CMHA -Vernon.



Board Governance Privacy Policy

Use (personal information):

To review, access, employ or apply personal information for any purpose by and within CMHA – Vernon.

Personal Information Protection Principles:

Principle 1-CMHA -Vernon's Accountability

CMHA– Vernon is responsible for all consumer personal information under its control. Its Privacy Officers accountable for CMHA - Vernon's compliance with the principles described in this policy.

The CMHA Vernon Privacy Officer may be contacted at:

Canadian Mental Health Association
Vernon and District Branch
Attention: Privacy Officer
3100 -28th Ave, Vernon BC V1T 1W3
Phone 250.542.3114
Fax 250.549.8446

Under this principle, CMHA -Vernon is responsible not only for personal information in its physical possession or custody but also for personal information that is transferred by CMHA -Vernon to a third party for processing. CMHA -Vernon will use contracts with such third parties to require them to give an appropriate level of protection to the personal information while it is being processed.

CMHA -Vernon has established and implemented:

- Procedures to protect personal information,
- Procedures to receive and respond to complaints and inquiries,
- Staff training to explain this policy and related privacy policies and practices, and
- Practices to ensure that clients and other individuals who contact CMHA - Vernon have access to this policy and other literature explaining CMHA - Vernon's policies and procedures.

The privacy policy is posted in a readily accessible location on CMHA Vernon's website.

Principle 2 - Identifying Purposes

The purposes for which personal information is collected will be identified by CMHA - Vernon and disclosed to the consumer at or before the time the information is collected.

Depending on the specific circumstances, CMHA -Vernon may collect the personal information of a consumer for one or more of the following purposes:

1. To evaluate the eligibility and suitability of a CMHA -Vernon consumer to receive or to continue receiving CMHA -Vernon Services,
2. To provide CMHA -Vernon Services to a consumer,
3. To communicate with government funders concerning the consumer's eligibility for Planning and Employment Services,
4. To communicate with other service providers, including but not limited to, Community Psychiatric Services, hospitals, and medical professionals, concerning issues relating to the consumer's circumstances to enable CMHA -Vernon to provide better care to the consumers (only with written consent from the individual consumer),
5. To comply with legal and regulatory requirements, and
6. To permit an analysis of CMHA -Vernon services and their efficacy for management purposes and statutory reports.

CMHA -Vernon will ensure that the above-noted purposes for collecting consumer personal information are drawn to the attention of the consumer and noted on the appropriate forms prepared with respect to a CMHA -Vernon consumer. Thereafter CMHA -Vernon will collect only the personal information that is necessary for those purposes unless the consumer expressly consents in advance to the collection of his or her personal information for some other specified purpose.

Circumstances may arise where CMHA -Vernon wishes to use or disclose personal information for a new purpose. CMHA -Vernon will ensure that personal information is not used or disclosed for that new purpose unless the individual is informed of the new purpose and gives his or her written consent.

CMHA Vernon will ensure that any questions about the purpose of collecting personal information are candidly and clearly answered.

Principle 3 – Consent

The knowledge and expressed consent of the individual consumer will be obtained for the collection, use, or disclosure of personal information by CMHA- Vernon, except where the consumer is deemed by law to have consented.

Except when noted limited exceptions apply, CMHA -Vernon will obtain the expressed

Board Governance Privacy Policy

consent of the individual consumer to the purposes for which his or her personal information will be collected, used, or disclosed. CMHA -Vernon will state the purposes in a form the individual can reasonably be considered to understand.

CMHA -Vernon will not, as a condition of the supply of CMHA -Vernon Services, require an individual to consent to the collection, use, or disclosure of his or her personal information beyond what is necessary to provide CMHA -Vernon Services.

CMHA -Vernon will obtain the consumer's written consent to the above – noted purposes for collecting, using, and disclosing consumer personal information through the use of a notice and signature line on the Intake Report.

Circumstances may arise where CMHA -Vernon wishes to collect consumer personal information from or disclose consumer information to:

1. Community Mental Health Services, Interior Health Authority,
2. Government of British Columbia, Government of Canada, or
3. Other persons or agencies as appropriate.

Includes but is not limited to providing advocacy, support, education, psychosocial rehabilitation, employment counseling, and housing to people with a mental illness. CMHA -Vernon will ensure that it obtains the advance written consent of the individual to such collection and disclosure of personal information. CMHA -Vernon will answer any questions about the purpose of such collection and disclosure candidly and clearly.

CMHA -Vernon employees involved in obtaining the signed consent of individuals to the collection, use, or disclosure of their personal information will be adequately trained to explain the nature and scope of the consent sought.

Information collected in the past: With respect to personal information collected in the past before this PIP policy came into effect, CMHA -Vernon will ensure that personal information about each individual is Used and disclosed only for the purposes described in Principle 2 of this PIP policy, except where the individual consumer gives expressed written consent in advance for a new purpose.

Withdrawal of Consent: An individual may withdraw his or her consent to the collection, use, or disclosure at any time, subject to legal or contractual restrictions and reasonable notice. CMHA -Vernon shall inform the individual of the likely consequences to the individual of such withdrawal of consent for the continued provision of CMHA -Vernon services. The individual may not withdraw consent, however, if doing so would frustrate the performance of a legal obligation.

Obtaining Consent: CMHA -Vernon will never obtain consent by deception. Whatever mechanism is employed by CMHA -Vernon to seek express consent, it will fairly and reasonably draw the individual's attention to the issue of consent.

An individual is deemed by law to consent to the collection, use, and disclosure of



Board Governance Privacy Policy

personal information if (a) at the time the consent is deemed to be given, the purpose would be considered to be obvious to a reasonable person, and (b) the individual voluntarily provides the personal information to the organization for that purpose.

Use of Social Insurance Number: CMHA -Vernon may ask an individual to permit his or her Social Insurance Number to be used for communicating with the Ministry of Human Resources concerning the consumer's eligibility for accessing services there, planning and employment services.

Circumstances where the individual's consent is not required:

CMHA -Vernon may lawfully collect personal information without the consent of the consumer, or from a source other than the client, where:

1. The collection of the personal information is clearly in the interests of the individual and consent cannot be obtained in a timely way,
2. The collection is necessary for the medical treatment of the individual and the individual is unable to give consent,
3. It is reasonable to expect that collection of the personal information with the consent of the individual would compromise the availability or accuracy of the information and the collection is reasonable for an investigation or a proceeding,
4. The information is already available to the public,
5. The collection is required or authorized by law, or
6. the information is collected from another organization, which collected it with the consent of the individual, and the information is collected solely for the purposes for which it was previously collected and to assist that organization.

Further, as permitted by law, CMHA -Vernon may use personal information, without the knowledge or consent of the individual, in circumstances where:

1. The use is clearly in the interests of the individual and consent could not be obtained in a timely way,
2. The use is necessary for the medical treatment of the individual and the individual does not have the legal capacity to give consent,
3. The use with the consent of the individual would compromise an investigation or proceeding and the use is reasonable for purposes related to an investigation or proceeding,
4. It is reasonable to believe that the information could be useful in the investigation of a contravention of federal, provincial, or foreign law, that has been, is being or is about to be committed, and the information is used to investigate that contravention,
5. The information is used to act in respect of an emergency that threatens the life, health, or security of an individual,
6. The information is used for the purpose of acting in respect of an emergency that threatens the life, health, or security of an individual,
7. The information is already available to the public,
8. The use is required or authorized by law,
9. The information was collected from another organization without consent, and

Board Governance Privacy Policy

- is used solely for the purposes for which it was previously collected, or
10. The use is necessary to respond to an emergency that threatens the life, health, or security of the individual.

With respect to the disclosure of personal information without expressed or implied consent, the CMHA - Vernon, as permitted by law, may disclose personal information without the knowledge or consent of the individual in the following circumstances;

1. The disclosure is clearly in the interests of the individual and consent could not be obtained in a timely way,
2. The disclosure is necessary for the medical treatment of the individual and the individual does not have the legal capacity to give consent,
3. It is reasonable to expect that the disclosure of the personal information with the consent of the individual would compromise the availability or accuracy of the information and the disclosure is reasonable for an investigation or a proceeding,
4. The personal information is already available to the public,
5. The disclosure is made to a lawyer who is representing CMHA -Vernon,
6. The disclosure is to collect a debt owed by the individual to CMHA -Vernon,
7. The disclosure is required to comply with a subpoena, warrant, or order issued or made by a court, person, or body with jurisdiction to compel the production of personal information,
8. The disclosure is to a public body or law enforcement agency in Canada, concerning an offense under the laws of Canada or a province, to assist in an investigation, or the making of a decision to undertake an investigation, (i) to determine whether the offense has taken place; or (ii) to prepare for the laying of the charge or the prosecution of the offense,
9. There are reasonable grounds to believe that compelling circumstances exist that affect the health or safety of any individual, or
10. The disclosure is required or authorized by law.

CMHA-Vernon will notify a consumer that a subpoena, warrant, or court order for the production of his or her personal information has been received if the law allows it. It may notify consumers by telephone or by letter to the consumer's last known address.

Principle 4 - Limiting Collection

CMHA -Vernon will limit the amount and type of personal information collected to that which is necessary for the purposes identified by CMHA-Vernon. The personal information will be collected by fair and lawful means.

Board Governance Privacy Policy

Although CMHA – Vernon will collect personal information primarily from the individuals concerned, with the individual's advance written consent, CMHA – Vernon may also collect information from their parties. If personal information is collected from a third party, CMHA – Vernon will note their identity unless there is a lawful reason for not doing so.

Principle 5 – Limiting Use, Disclosure, and Retention

CMHA-Vernon will not use or disclose personal information for purposes other than those for which it was collected, except with the consent of the individual or as required or permitted by law. Personal information will be retained only as long as necessary for the fulfillment of those purposes.

Personal information that has been used by CMHA-Vernon to make a decision that directly affects an individual will be retained for at least one year after using it, to allow the individual to have a reasonable opportunity to obtain access to the information.

CMHA-Vernon will retain an individual's personal information only as long as necessary for the identified purposes and legal or business purposes.

CMHA-Vernon will shred, destroy, or make anonymous, any personal information no longer needed for its identified purposes, legal, or business requirements.

Principle 6 – Accuracy

CMHA-Vernon will make a reasonable effort to ensure that personal information collected by CMHA- Vernon or on its behalf is as accurate and complete as is necessary for the purposes for which it is to be used.

CMHA-Vernon will not routinely update personal information unless such updating is necessary to fulfill the purposes for which the information was collected.

CMHA-Vernon will generally rely on individuals to provide updated information, such as changes to addresses and other contact information.

If an individual successfully demonstrates to CMHA-Vernon that personal information is inaccurate, incomplete, out of date, or irrelevant, CMHA-Vernon will revise the personal information. If necessary, CMHA-Vernon will disclose the revised personal information to third parties, which were provided, with the wrong information to permit them to revise their records as well. If no revision is made, CMHA- Vernon will annotate the personal information under its control with the correction that was requested but not made.

Principle 7 – Safeguards

CMHA-Vernon will make reasonable security arrangements to protect personal information.

Board Governance Privacy Policy

Security arrangements are employed to protect consumer personal information against loss or theft, as well as unauthorized access, collection, use, disclosure, copying, modification, disposal, or similar risks. CMHA-Vernon will protect personal information regardless of the format in which it is held.

The nature of CMHA -Vernon 's safeguards will vary depending on the sensitivity of the personal information that has been collected, the amount, distribution, and format of the information, and the method of storage. The more sensitive personal information will be safeguarded at a higher level of protection.

The methods of protection employed by CMHA-Vernon will include:

- Physical measures, including locked filing cabinets and restricted access to offices, and
- Technological measures, such as the use of passwords and encryption.

CMHA-Vernon will inform individuals about CMHA-Vernon's policies and procedures for protecting personal information and will emphasize the importance of complying with them. As a condition of employment, employees will be required to conform to CMHA-Vernon 's policies and procedures concerning the security of personal information.

When CMHA-Vernon discloses personal information to third parties, CMHA-Vernon will require these third parties to safeguard all personal information in a way that is consistent with CMHA-Vernon's measures, and which complies with these principles.

CMHA-Vernon will ensure that third parties who provide services that involve the disclosure of personal information are contractually bound to adhere to CMHA-Vernon standards in the protection of personal information.

CMHA-Vernon will use care in the disposal or destruction of personal information, to prevent unauthorized parties from gaining access to the information.

Principle 8 – Openness

CMHA-Vernon will be open about its policies and procedures concerning the management of consumer personal information. CMHA-Vernon will ensure that individuals can acquire information about CMHA-Vernon's policies and procedures without unreasonable effort. CMHA-Vernon will make this information available in a generally understandable form.

Copies of this PIP policy will be made available, on request, to client individuals whose personal information is in the custody or control of CMHA-Vernon.

CMHA-Vernon will provide individual consumers, upon request, with the following:

- The name of the Privacy Officer and contact information,

Board Governance Privacy Policy

- The means of gaining access to personal information held by CMHA-Vernon,
- A description of the type of personal information that is held by CMHA-Vernon, including a general account of its use, and
- A copy of each brochure or other information that explains CMHA-Vernon's policies, standards, or codes.

CMHA-Vernon will also employ its website to make publicly available, information concerning this policy and CMHA-Vernon's privacy policies and procedures.

Principle 9 - Individual Access

Upon a request in writing, CMHA-Vernon shall inform an individual of the existence, use, and disclosure of his or her personal information and the individual shall be given access to that information, except where the law requires or permits CMHA-Vernon to deny access.

CMHA-Vernon will assist any individual consumer who informs CMHA-Vernon that they need assistance in preparing a request to CMHA-Vernon.

CMHA-Vernon may require the individual to provide sufficient information to permit CMHA-Vernon, with a reasonable effort, to provide an account of the existence, use, and disclosure of personal information. The information provided by the individual in response to CMHA-Vernon's request will be used only for this purpose.

CMHA-Vernon will respond to a request as accurately and completely as reasonably possible and in any case not later than 30 days after receipt of the request.

Where CMHA-Vernon responds by refusing a request, CMHA-Vernon will inform the individual in writing of the refusal and set out the reasons.

And Individuals will be permitted to challenge the accuracy and completeness of the personal information collected, used, or disclosed by CMHA-Vernon and have it amended as appropriate.

As required or permitted by law, CMHA-Vernon may lawfully deny access by an individual to his or her personal information where:

1. The information is protected by solicitor-client privilege,
2. It would reveal confidential commercial information that if disclosed, could in the opinion of a reasonable person, harm the competitive position of the organization,
3. The personal information was lawfully collected without consent for an investigation and the investigation and associated proceedings, and appeals have not been completed, or
4. The personal information was collected or created by a mediator or arbitrator appointed under the enactment or by a court.

Board Governance Privacy Policy

Where CMHA-Vernon is entitled to withhold access to personal information, and that information is severable from other information for which access is requested, CMHA-Vernon will provide access to an edited copy of the personal information after severing such information.

As required by law, CMHA-Vernon will not give an individual access to personal information if doing so:

- (a) Could reasonably be expected to threaten the safety or physical or mental health of another individual,
- (b) Or cause immediate or grave harm to the safety or to the physical or mental health of the individual, or
- (c) The disclosure would reveal the identity of an individual who has provided personal information about another individual and that individual does not consent to the disclosure of his or her identity.

In providing an account of third parties to whom CMHA-Vernon has disclosed personal information about an individual, CMHA-Vernon will attempt to be as specific as possible. Where it is not possible to provide a list of the organizations to which CMHA-Vernon has disclosed information about an individual, CMHA-Vernon shall provide a list of organizations to which it may have disclosed information about the individual.

CMHA-Vernon will not record in a consumer's file when personal information was disclosed to third parties for routine purposes. (e.g., reporting to Canada Customs & Revenue Agency — T4 and other reports)

If CMHA-Vernon is satisfied on reasonable grounds that an individual successfully demonstrates personal information is inaccurate or incomplete, CMHA-Vernon shall correct the information as required. CMHA-Vernon shall send the corrected personal information to third parties who have been given the original information in question during the year before the date the correction was made. Where CMHA-Vernon disagrees with the requested correction, CMHA-Vernon will annotate the personal information with the correction that was requested but not made.

Principle 10 - Challenging Compliance

An individual will be able to direct a challenge concerning compliance with the above principles to the designated individual accountable for CMHA-Vernon's compliance.

The individual accountable for CMHA-Vernon's compliance is the Privacy Officer.

CMHA-Vernon will establish procedures to receive and respond to complaints or inquiries about CMHA-Vernon's policies and practices relating to the handling of

Board Governance Privacy Policy

personal information. The complaint procedure will be easily accessible and simple to use.

CMHA-Vernon will inform individuals about these procedures by means of using brochures or other documents, which will be easy to understand and use. The complaint resolution process will be explained and contact information for consumers will be provided.

CMHA-Vernon will investigate all complaints. If CMHA-Vernon finds that a complaint is justified, CMHA-Vernon will take appropriate measures, including if necessary, amending its policies and procedures.

CONFIDENTIALITY, PROTECTION OF PRIVACY, AND DISCLOSURE OF INFORMATION

Policy: In all circumstances, staff will remain aware of the right of clients to have information about them held in confidence. The following guidelines are to be applied in maintaining the confidentiality and disclosing information.

Guidelines: The Association complies with Personal Information Protection Act (PIPA) and will not release client - related information without a signed Authorization of Release of Information Form unless exempted by law (i.e. subpoenaed documents or files, search warrants, investigations, or other legal actions). The Association's confidentiality policy is explained to clients during the initial orientation to a program, including to what extent information will or will not be shared with referring workers, probation officers, parents/ guardians, or others having a professional interest. Client confidentiality does not include keeping client information from supervisors, as this undermines supervision and leaves the client, worker, and Association vulnerable.

Staff will not share private information about clients or co-workers with other clients. Information about clients should not be discussed in public places where conversations may be overheard. Staff discussing clients, in their presence, are to include them as participants in the conversation. All information of a child protection nature must be reported to the Ministry of Children and Family Development, by law, as soon as possible. Refer to Item DI, Duty to Report Child Protection Concerns (this Manual).

Staff will cooperate with Police and provide relevant information if a client is a suspect in an investigation, or if a child or youth has been reported as a missing person. If staff are made aware that a person (adult or youth) has committed a serious crime(s), they have a civil responsibility to report this information to the Police. Ideally, the individual being reported should be informed that the reporting is taking place. However, under some circumstances, this may not be the best plan. The program

Board Governance Privacy Policy

supervisor must be kept informed of all situations involving serious crime or the Police. Disclosure of information necessary to prevent people from harming themselves or others is justified.

The use of any confidential information for education or training purposes must be discussed and approved by the program supervisor in advance. Clients may access any reports or documents we write about them, and as a matter of good practice, Association workers will routinely share reports with the clients about whom they are written. Any confidential third-party information contained in such reports must be "blackened" or "whitened" out before sharing the record. Staff must remain aware that any written information pertaining to specific clients, or the overall functioning of a program could be utilized in an investigation or subpoenaed as evidence in court.

Association policy manuals, policy statements, program descriptions, etc., are not considered confidential and will be made available to clients, parents/guardians of clients, and funders upon request. When a person served informs his/her worker they wish to review their file, the process to be followed is:

- a) The client is advised that full access to their file will be provided within 5 working days,
- b) Any confidential third-party information contained in such reports must be "blackened" or "whitened" out before sharing the record, and
- c) The supervisor is to be informed of the request.

Requests for Association policy from other agencies are to be forwarded to the supervisor for consideration. Access to files is limited to: the worker(s) providing the client the direct service, the program supervisor or Executive Director, the client, the funding Ministry, government representatives investigating a complaint, the Coroner's Office if investigating a death, and an internal or external audit team. Access to file information by other non-Association professionals is limited to those who provide signed written consent of the client, or if applicable, the child or youth's legal guardian. When clients are referred from one Association program to another, information will be shared between workers/supervisors on a need-to-know basis, and in most circumstances, all reports/ files will be shared.

Cross Reference: All Programs Manual, Section L. Files of Persons Served
Personnel P & P Manual, Conditions of Employment: Confidentiality

Board Governance Privacy Policy

CONFIDENTIALITY, PROTECTION OF PRIVACY, AND DISCLOSURE OF INFORMATION

Confidential Documents, Notes, Day-timers, and the Protection of Privacy:

Information on persons served will be maintained in a secure (locked) place including appropriate protection against fire, water damage, theft, and other hazards. Files are not to be removed from the work site without permission from the program supervisor. Files or briefcases containing confidential documents or disks may not be left in cars (i.e., not to be left in cars overnight). No confidential paper (s) should be left out unattended or overnight where others may see them or thrown in trash baskets or recycling bins without shredding. Day-timers or notebooks containing confidential notes should be treated with care and should not be left lying around or be left in a car. Day-timers/notebooks should only carry as much information as needed and are considered to be useful for carrying out the day-to-day functions of the job. Confidential notes should be transferred from the day-timer or notebook to the client file on a monthly or more frequent basis.

Documents Requested or Subpoenaed for Court:

If a file, report, notebook, day-timer, etc. is requested or subpoenaed for court purposes, the supervisor must be notified immediately and the file, report, etc. in question must be forwarded in its entirety, without alteration to the Executive Director. As many of the Association's programs are considered to be government-funded, files are considered documents of the funding Ministry's legal department. The supervisor will inform the funding Ministry and ask that this occurs. Any file sent out of the office will be photocopied for our records in advance. Depending on the individual circumstances and file contents there may be situations in which it is good practice for the worker involved to debrief with the client the contents of his/her file before the file is handed over. This should be done only after any confidential third-party information has been "blackened" or "whitened" out by the Privacy Officer (Executive Director). The Executive Director will advise the Board of Directors in the event documents or files are subpoenaed for court purposes.

Computers and Computer Disks:

Computer disks containing confidential information will be treated like other confidential documents and will be destroyed (deleted) rather than thrown out. Computers containing confidential information may not be used by clients or non-staff members without approval from the program supervisor and without the constant supervision of the staff member allowing/ supervising the access. All computers which are shared by staff and clients, and which are situated in a "client use" area will require a password for staff to control access and supervisor usage.

Board Governance Privacy Policy

Only staff may have knowledge of the password. No client information should be saved to the hard drive of computers used by clients. All client information will be removed from any computer moved from a staff use area to a client use area. Computer screens displaying confidential information should not be left on, unattended, or within the range of vision of a client or visitor. If staff work on client reports on their home computers, they must save to disk and not to the hard drive. These disks must be brought into the office and may not be stored at home or left overnight in cars.

Fax Machines: Fax machines will not be kept in public areas. Standard cover sheets are to be sent with all faxes stating that 'some of our messages are confidential and should it be received in error, please telephone the Association and send the message back by mail.'

Telephone Conversations and Cellular Phones: All telephone conversations with, or regarding, clients are to be held in a manner that respects the client's right to confidentiality. Conversations with or about a client are not to be held within hearing of non-staff members or in the reception areas of the Association offices.

Email: Electronic mail sent or received is not confidential and belongs to the agency/company purchasing the email program regardless of 'personal' email addresses.

Procedure to be Followed on Receiving a Request:

Requests for disclosure of information often involve legal cases and are made by lawyers. The Executive Director is the Privacy Officer for the Association. A detailed procedure manual is available at the main Branch Office. The following is a general summary of the procedure should a CMHA-Vernon site have a request under the act or are questioned regarding the general procedure. Residents in Facility Care have an In-house procedure for facility care and should make their request known to their case manager and/or the Manager of the Facility.

General Outline of Formal Request:

- All requests for information contained in the files of any contracted service of the Canadian Mental Health Association – Vernon and District Branch must be in writing and signed by the applicant.
- Upon receiving a request, under the Act, the written request and complete file of the individual must be given to the Executive Director of CMHA-Vernon at 3100 – 28th Avenue immediately. The request is time-sensitive and therefore must be date-stamped and delivered immediately upon request.



Board Governance Privacy Policy

- The date of receiving the file, and all subsequent letters, phone calls, and processes/actions regarding the release of information will be logged. The file number will be clearly referenced.
- A letter will be sent by the Executive Director (or delegate) to the requestor of information, acknowledging receipt of the request act and the date the request will be filled. Under the Act, the request must be honored within thirty working days.
- The file must be read in its entirety by the Executive Director (or delegate) and a representative from the contractor. A note must be made of, and a letter sent to each third-party individual mentioned in the file requesting they agree to disclose their information in the file. A photocopy of all pertinent pages must be attached to the letter and the date of letters recorded in the log.
- When a third-party refuses to disclose their information, these pages must be re-photocopied with the entry or entries in question covered and a note on the cover stating who to contact regarding access to the pertinent entries.
- When forwarding the file, an accompanying letter must be sent restating that which was originally requested and noting the pages that were severed.
- If the file in question is picked up and not delivered by a CMHA-Vernon delegate/staff, a note must be signed confirming the date and the individual who picked up the file. This document must also be witnessed.
- The original file is then returned to its original location with the severed pages covered but still accessible noting that the information on this page(s) must not be disclosed and who to contact under the act to obtain access.