

To Share or Not To Share:



Technology & Confidentiality Tools for Innovative Partnerships

Template Forms & Policies

Your innovative partnership and partner agencies are encouraged to use and adapt these model forms and policies to fit your needs and the work you do. You may change wording to match the language your agency or partnership prefers (e.g. client, victim, survivor, service participant). When adapting a template for use, simply: add information relevant to your specific agency, partnership and funders; insert your [program/agency/partnership/collaboration names] and letterhead; and, remove generic template **blue instruction notes** and other notices.

Template Forms:

1. Client Notice of Rights / Confidentiality Form - In English & Spanish

This form is used to provide upfront notice to each client about their rights and your practices, including your agency's information sharing and confidentiality protections and requirements, and their rights regarding the confidentiality of their personal information and communications.

2. Client Limited Release of Information Form - In English & Spanish

This form is used to help a client assess risks and benefits of having an agency release some of her/his confidential information to another individual/agency. The form enables the client to choose what information an agency may share, how it is shared, with whom, and for how long.

Template Policies:

1. General Philosophy & Principles on Confidentiality for Community-Based Domestic Violence/Sexual Assault Advocacy Programs

This piece addresses principles that partners can agree to respect regarding: transparent notice of victim/client rights, differing confidentiality and information sharing obligations, confidentiality walls, policy adherence, confidentiality commitments and duration, law, and technology use. It suggests trainings and policies for specific innovative partnership types.

2. Model Policy: Confidentiality, Privacy, and VAWA 2005 for Community-Based Domestic Violence/Sexual Assault Advocacy Programs

This model policy has sections addressing: general principles; a written agreement to maintain confidentiality; definitions including what constitutes confidential and personally identifying information; the prohibition to release information to anyone outside the agency (e.g. shelter address, staff and survivor information); protocols for releases of information; and possible exceptions to confidentiality including mandatory reporting. This policy is intended to be signed by all agency/program staff.

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3. **Template Policy: Confidentiality and Privacy for Co-Located Domestic Violence/Sexual Assault Advocacy Programs and Partners**

This policy has sections addressing: common goals and understandings, information that gets collected during any collaboration intake process, assessing interest in services and safety planning, protecting confidentiality while collecting victim information, and, details around managing the confidentiality of information inflow and outflow.

4. **Template Policy: Sharing Physical Space for Co-Located Domestic Violence/Sexual Assault Advocacy Programs and Partners**

This policy briefly addresses staff roles, office space, and building security for entities that share a building or have physical access to the space occupied by the partnership.

5. **Template Policy: Securing Paper and Electronic Information for Co-Located Domestic Violence/Sexual Assault Advocacy Programs and Partners**

This details policies that individual agencies and innovative partnerships should address to secure all electronic, paper and faxed records and information, including computers, electronic networks, and passwords.

6. **Template Policy: Confidentiality and Privacy for Community Collaboration with Domestic Violence/Sexual Assault Advocacy Programs and Partners**

This details policies for service provider understandings and responsibilities, victims' rights, guidelines for addressing system issues through the community collaboration, and, the limited sharing of client/victim information with collaboration partners.

7. **Template Memorandum of Understanding: Partnership Agreement for Community Collaborations**

This MOU addresses policies to govern the partnership. It details the individual partner's roles and responsibilities, information sharing and confidentiality obligations for: a domestic violence/sexual assault agency, law enforcement, prosecutor, court partner, medical partner, faith-based and community organization, and a confidentiality monitor. All partners sign to acknowledge agreement.

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