

Confidentiality Policy Template

1.OBJECTIVE

â€¢[Company Name] recognizes that employees, contractors, sub-contractors & others who work within our organization, gain information about individuals and organizations during the course of their work or activities.

â€¢In most cases, such information will not be stated as confidential and individual may have to exercise common sense and discretion in identifying whether information is expected to be confidential.

â€¢This policy aims to give guidance but if in doubt, seek advice from your line manager.

2.SCOPE

This policy is applicable to all employees working at all levels of the organization, as well as other workers, including agency employees, temporary staff, consultants and independent contractors.

Third parties who have access to [Company Name]'s premises (such as self-employed contractors, self-employed sub-contractors, customers and visitors) are also required to comply with this policy.

Such employees, workers, and third parties are referred to herein collectively as the "Covered Parties".

3.GENERAL GUIDELINES

â€¢Information received by [Company Name] as part of the services it provides, will be considered as the information for [Company Name] to share and use, to fulfil its aims and objectives.

â€¢Covered Party should inform groups, organizations or individuals why they are requesting information and explain the purpose of storing and using this information.

â€¢Covered Party should seek permission to keep and use this information.

â€¢Covered Parties are allowed to share information with their Line Managers in order to discuss issues and seek advice.

â€¢Covered Parties will not disclose to anyone, other than their line managers, any information considered sensitive, personal, financial or private without the knowledge or consent of the

individual, or an officer, in the case of an organization.

â€¢Covered Parties should avoid exchanging personal information or comments (gossip) about individuals with whom they have a professional relationship.

â€¢Covered Parties should avoid talking about organizations or individuals in social settings.

â€¢There may be circumstance where covered parties would want to discuss difficult situations with each other to gain a wider perspective on how to approach a problem.

â€¢If covered parties receive information from individuals outside [Company Name] regarding the conduct of a covered party or group, then this should be dealt with efficiently and sensitively. The appropriate covered party should tell the individual about the complaint procedure and advise them accordingly.

â€¢If employees are dissatisfied with the conduct of a covered party, and have sensitive information that could be evidenced through investigation, they should discuss it with the appropriate line manager under the Whistle Blowing Procedure. Any allegation, which is found to be malicious, or ill-founded, will be dealt with by [Company Name] under the Grievance Redressal and Disciplinary Action Policy.

â€¢Where there is a legal duty/obligation on [Company Name] to disclose information, the person that is affected will be informed that the disclosure has or will be made.

4.WHY CONFIDENTIALITY

â€¢Most information held by [Company Name] relates to Individuals or service users, members, employees, trustees, and volunteers.

â€¢Information is kept to enable [Company Name] covered parties to understand the needs of individuals or service users in order to deliver the most appropriate services and products.

â€¢Information about users may be kept for the purpose of monitoring and reporting.

5.ACCESS TO INFORMATION

â€¢Information is confidential to [Company Name] as an organization and may be shared with the covered party, line managers or trustees to ensure best quality services & products for users.

• Where information is sensitive, i.e. it involves disputes or legal issues, it will be confidential to the employee dealing with the case and their line manager. Such information should be clearly labelled 'Confidential' and should state the names of the covered parties entitled to access the information and the name of the individual or group who may request access to the information.

• Covered parties will not withhold information from their line manager unless it is purely personal to them and not business related.

• Users may see [Company Name] records which relates to them or their organization. The request must be made in writing with the Line Manager & HR Head giving 14 days' notice. The letter must be signed by the individual, or in the case of an organization's records, by the Chief Executive Officer.

• Sensitive information as outlined above will only be made available to the person or organization named on the file.

• Employees may see all of their personnel records by giving 14 days' notice in writing to the line manager.

• When photocopying or working on confidential documents, covered parties must ensure they are not seen by the people passing by. This also applies to information on computer screens.

6.STORING INFORMATION

• General non-confidential information about the organization is kept in unlocked filing cabinets that are available to all the company's covered parties.

• Information about volunteers, interns and other individual's will kept in filing cabinets by the covered party directly responsible. Covered parties must ensure that their line managers know how to gain access.

• Employees' personnel information will be kept in lockable filing cabinets under the custody of line managers/business HR and will be accessible to the Senior Management.

• Files or filing cabinet drawers bearing confidential information should be labelled 'confidential'.

• In an emergency situation, the senior management may authorize access to files by other

people.

• Ensure confidential documentation or personal data is shredded before putting in the recycling bins.

7. DISCLOSURE OF INFORMATION

[Company Name] has a legal duty to disclose some information including:

• Any criminal or unlawful act will be disclosed to the police.

• In addition, covered party believing an illegal act has taken place, or that a user is at risk of harming themselves or others, must report immediately to the line manager/ business HR who will report it to the appropriate authorities.

• [Company Name] should inform the users of this disclosure.

8. DATA PROTECTION

Information about individuals, whether on computer or on paper, must comply with the data protection principles, which states that the personal data must be:

• Obtained and processed fairly and lawfully

• Held only for specified purposes

• Adequate, relevant and not excessive

• Accurate and up to date

• Kept no longer than necessary

• Securely kept and protected

9. BREACH OF CONFIDENTIALITY

• Covered parties who are dissatisfied with the conduct or actions of other covered parties or [Company Name] should raise this with their line manager/ business HR using the grievance procedure, if necessary, and should not discuss their dissatisfaction outside [Company Name].

• Covered parties accessing unauthorized files or breaching confidentiality may face disciplinary action. Ex-employees breaching confidentiality may face legal action.

â€¢Any covered parties who have concerns about the use of [Company Name] funds, or any practice by any employee must comply with the requirements of the Whistle Blowing Policy.

10.DISCLAIMER

â€¢The policy and procedures explained in this document may change at any time, at the sole discretion of the Management of [Company Name], without prior notice. No statement or promise by a supervisor, manager or department head may be interpreted as a change in policy nor will it constitute an agreement with an employee.

â€¢This policy document should be read in conjunction with Local Labor laws which for the avoidance of doubt will take precedence over this policy document

â€¢This policy document shall be effective from the date of issuance and supersede all previous procedures and understandings pertaining to the subject.

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