



Kokua Services
SUPPORT • ENCOURAGE • EMPOWER

POLICY 1.2

Confidentiality

◆ Purpose

This policy protects the confidentiality of client and employee information.

QUICK REFERENCE

Never: Share client information without a signed release or a court order.

Client info is accessed on: Secure Kokua systems only: Tresorit or Therap. Never a personal device.

Breaching confidentiality: leads to discipline and may result in termination.

◆ Policy Statement

Client and employee information is confidential. Kokua protects it through signed releases, secure storage, required training, and clear limits on who has access to it.

◆ Client Records

No client information, written or verbal, is released to a third party without a signed release document from the client or legal guardian, or a lawful court order.

- Keep copies of every current release in the client's office file. Review and re-sign releases annually, or start a new one whenever needed.
- Every new hire is trained on HIPAA regulations. Staff read and sign a confidentiality statement acknowledging the expectation of strict confidentiality around client information.
- Any printed documentation with personal client information, needing to be discarded, goes to a properly labeled shred bin in a locked office. This is then transported to the LeMay shred bin at the B1 office for destruction.
- Electronic client information stays on secure Kokua computers (rare) or in the Kokua Tresorit account or secure Therap account (preferred). Never store Kokua documents, client photos, or client information on a personal device. This includes: flash drives, laptops, phones, or tablets.
- See the Therap policy for that system's specific rules.

Breaching client confidentiality is a serious policy violation, and can lead to discipline up to and including termination.

◆ Employee Records

Personnel records are confidential. Access is limited to the Executive Director, the Administrative Assistant, Kokua Human Resources staff, and the Business Operations Coordinator.

No information from an employee's record goes to a third party without a written release from that employee, or a lawful court order. The exception being DDA or RCS evaluations, investigations, and follow-up.

Employees may submit a written request for copies of their own personnel file. Client names, third parties, or anything else potentially identifying gets redacted before the documents are released. Any extra printed documentation with employee information goes into the locked shredding bin.

◆ Confidentiality Agreement

All office staff sign the Administrative Confidentiality Statement at the time of hire.

◆ WHY THIS MATTERS AT KOKUA

People trust Kokua with some of the most personal details of their lives. Being vigilant in protecting that information is how we earn and keep that trust.

Related Policies: 1.15 Report & Investigate Improper Activity · 3.95 Records Retention

Last Updated: [pending final review]