HOUSING SPECIALIST

Client Confidentiality & Information-Sharing Decision Toolkit

Professional Download #27

Purpose
This toolkit helps Housing Specialists make careful, consistent decisions about collecting, using and sharing client information. It provides practical checks for consent, a clear decision path, documentation tools, secure communication guidance, and realistic practice scenarios.

What's Inside (6 Pages)

1. Privacy First: Intake & Consent — essential checks before collecting or sharing client information.
2. Six-Step Information-Sharing Decision Path — determine what can be shared, with whom and why.
3. Consent & Disclosure Verification Log — document authorization and disclosure decisions.
4. Secure Communication & Incident Response — prevent inappropriate disclosures and respond to mistakes.
5. Three Practical Case Scenarios — practise responding to requests from landlords, partner agencies and colleagues using AI.
6. Supervision Review & 30-Day Improvement Plan — strengthen confidentiality practices.

Important Professional Reminder
Client information is shared only when authorized, necessary, and proportionate. When uncertain, pause and consult your supervisor or privacy lead before disclosing. This toolkit supports good practice — it does not replace organizational policy or applicable privacy law.

Housing Specialist: _____ **Date:** _____

Client / Case ID (if applicable): _____ **Supervisor:** _____

1. Privacy First: Intake & Consent

Before collecting personal information

- ■ I have a clear, legitimate purpose for collecting this information
- ■ I am collecting only what is necessary for that purpose
- ■ I can explain to the client why the information is needed

Consent checks before sharing

- ■ Client has been informed what will be shared and with whom
- ■ Client understands the purpose of the sharing
- ■ Client understands any limits to confidentiality (safety, legal requirements, etc.)
- ■ Consent is specific (not open-ended) and documented according to agency policy
- ■ Client has the opportunity to ask questions and to refuse or limit sharing where appropriate

Exceptions / special considerations noted:

_____
_____

Minimum necessary principle

Even with consent, share only the information required for the specific purpose. Avoid “just in case” or overly broad disclosures.

Information I plan to share (list specifically):

_____
_____

2. Six-Step Information-Sharing Decision Path

Step 1 — What is being requested, and by whom?

Requestor: _____ Role / Organization: _____
Specific information requested: _____

Step 2 — Is there a lawful / policy basis to share?

■ Client consent on file for this purpose ■ Legal obligation / court order
■ Safety / emergency exception (document basis) ■ No clear basis → do not share yet

Step 3 — Is the request proportionate (minimum necessary)?

■ Yes – only what is needed ■ No – request is broader than necessary → narrow or refuse

Step 4 — Are there any special sensitivities or restrictions?

■ Health / disability details ■ Safety / DV concerns ■ Immigration status
■ Client has limited consent ■ Other: _____

Step 5 — Decision

■ Share as requested ■ Share limited / redacted version ■ Decline / seek more authority
■ Consult supervisor / privacy lead before deciding

Step 6 — Document the decision (use the log on the next page)

Date of decision: _____ Decision maker: _____

3. Consent & Disclosure Verification Log

Date	Requestor	Info Shared / Withheld	Basis (Consent / Legal / etc.)	Decision

4. Secure Communication & Incident Response

Secure practices checklist

- ■ Use agency-approved channels (secure email, portal, encrypted methods) for sensitive information
- ■ Verify recipient identity and authorization before sending
- ■ Avoid including unnecessary identifiers in subject lines or unsecured messages
- ■ Do not discuss client details in public or shared spaces
- ■ Lock screens and store physical files securely

If an inappropriate disclosure occurs (or is suspected)

1. Stop further disclosure immediately
2. Notify your supervisor / privacy lead without delay
3. Document what happened, when, and who was involved
4. Follow agency incident response and client notification procedures
5. Participate in any required review or corrective action

5. Three Practical Case Scenarios

Scenario A – Landlord Request

A landlord calls and asks for the client's full income details, previous eviction history, and "anything else that might be relevant" before scheduling a viewing. How do you respond?

My response approach: _____
_____

Scenario B – Partner Agency

A partner agency worker says they "already know the client" and asks you to email the full case summary to a general team inbox so they can "get up to speed quickly."

My response approach: _____
_____

Scenario C – Colleague & AI

A colleague asks you to paste a client's detailed notes into a public AI tool to "quickly draft a strong advocacy letter." What do you do?

My response approach: _____
_____

6. Supervision Review & 30-Day Improvement Plan

Self-assessment (current confidence)

Applying consent checks consistently ..... ■ Low ■ Developing ■ Solid ■ Strong
Using the minimum necessary principle ..... ■ Low ■ Developing ■ Solid ■ Strong
Responding to third-party requests ..... ■ Low ■ Developing ■ Solid ■ Strong
Secure communication habits ..... ■ Low ■ Developing ■ Solid ■ Strong
Knowing when to escalate / consult ..... ■ Low ■ Developing ■ Solid ■ Strong

My 30-day focus areas:

1. _____
2. _____

Actions I will take:

■ Review agency privacy / confidentiality policy
■ Discuss one real or practice scenario in supervision
■ Use the Decision Path on the next 3 information-sharing requests
■ Other: _____

Supervisor comments / support agreed:

_____
_____
_____

Housing Specialist	Date	Supervisor
_____	_____	_____

Keep this toolkit accessible for daily reference. Use the Decision Path and Log whenever you are unsure about sharing information. Revisit the improvement plan during supervision.