



# Protecting Client Data

Presented by Micheline Proctor



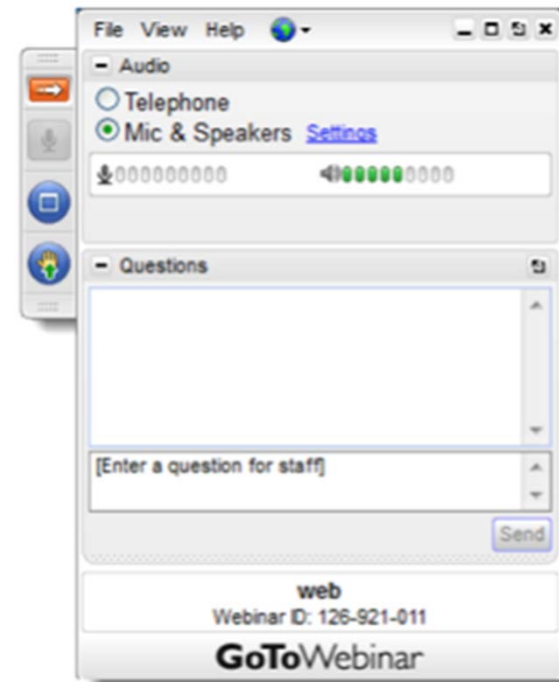


## Today we will cover:

- Which client information needs to be protected
- How to protect confidential information:
  - in the office
  - in the field
  - in reporting/storytelling

# How to ask questions:

Type any questions you have during the presentation in this question box.





Q: Which client information needs to be protected?



**A: All personally identifiable  
information (PII)**



## Obvious PII

- Names
- Social security numbers
- Date of birth
- Contact information (phone number, address, email)



## Not-so-obvious PII

- Anything that could help someone guess a client's identity
  - Descriptions of the client's job or school
  - Medical information
  - Personal descriptions (racial or ethnic information notes)
  - Age



Activity: Which information is PII?

“A 36 year old man, John Smith, came into the office today using a cane and limping from an injury he said he got at his job as a forklift driver over at United Distribution. His family was having a hard time because his son has leukemia and his wife is not able to work between the doctors’ appointments and caring for their other two children”.

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## PII

“A 36 year old man, John Smith, came into the office today using a cane and limping from an injury he said he got at his job as a forklift driver over at United Distribution. His family was having a hard time because his son has leukemia and his wife is not able to work between the doctors’ appointments and caring for their other two children”.



**GPS**

**Get, Protect, Shred**



# **How to Protect Client Information in the Office**




# Electronic Information



## Electronic Information

- All computers and devices must be password protected





## How to create a strong password

- Use a combination of numbers, upper and lowercase letters, and special characters (\* & \$ # @)
- Have at least 8 characters
- Do not use any words you could find in the dictionary



Activity:

1. Think of a sentence

The Oregon Ducks are number one!

2. Use that sentence to make a password

TODr#1!

Remember: A good password is easy to remember but hard to guess.



## Keep your password safe

- Do not write it down or share it
- Do not reuse passwords
- Change the password often (every 30–60 days)





## Electronic Information

- Encrypt all client data
- Lock your device every time you step away
- Use a privacy screen if your computer screen is visible to others
- Do not let anyone who is not working on the client cases use a computer that is storing client information
- Do not open suspicious emails (spam)



## How to “Shred” Electronic Information

- Delete the file and then empty the trash on your computer

# Printed Information



## Printed Information

- All paper with client information on it must be stored in a locked cabinet at all times





## Printed Information

- When you print or a fax comes in, pick up the papers from the printer immediately

## Printed Information

If you are working with papers with client data on them make sure no one else is able to read them.





## Promising Practices

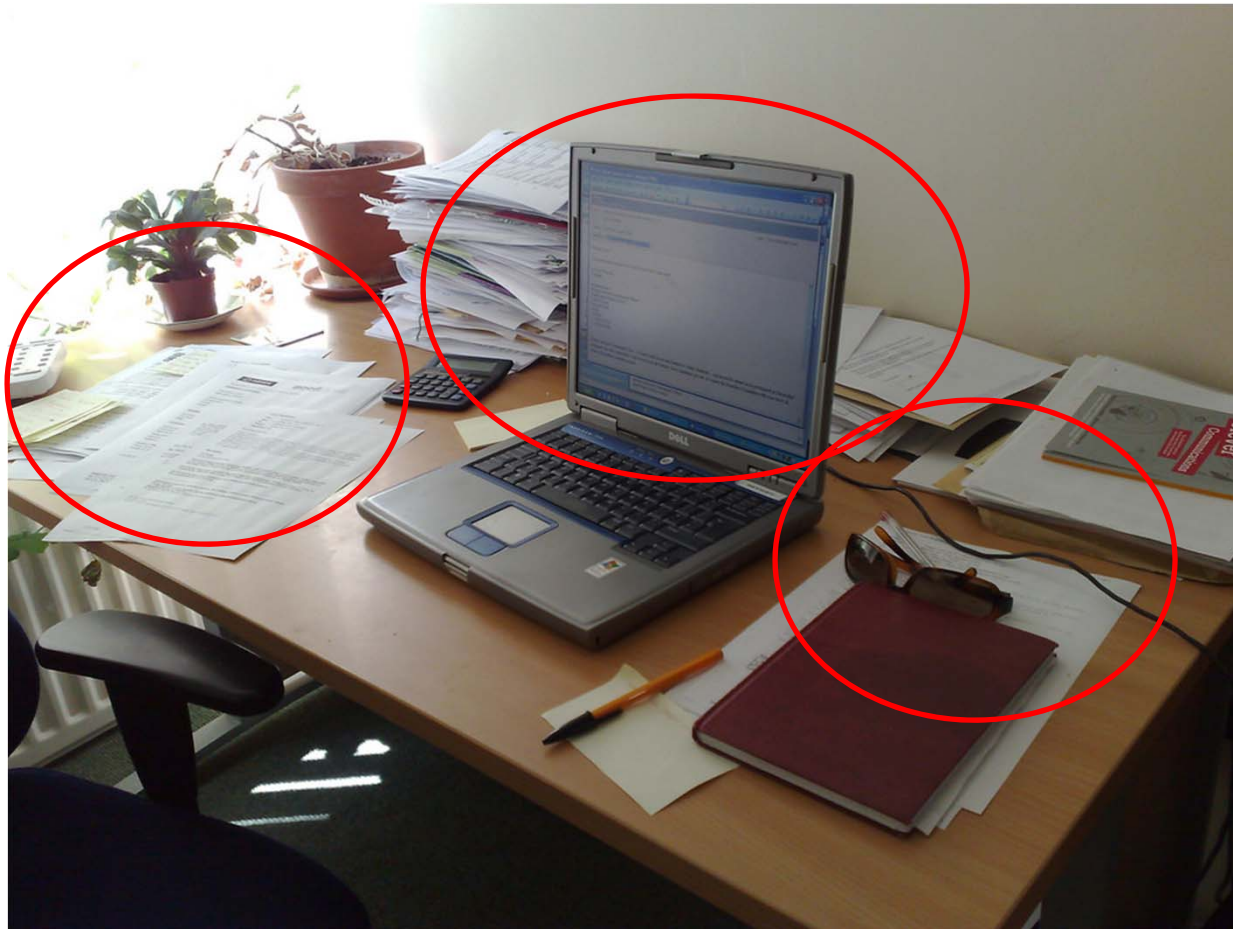
- Do not discuss client cases with any PII with anyone
- Use a piece of paper to cover previous names on any sign-in sheets in your office
- Routinely shred all documents with client info
  - If you have a shredding service, make sure the pick up bin is locked at all times

Activity: Spot the places where client data is not secure





Activity: Spot the places where client data is not secure





# How to Protect Client Information in the Field

## Create a “Privacy Bubble”



- Have enough space around you and the client that you can't be overheard

## Promising Practices for Distributions

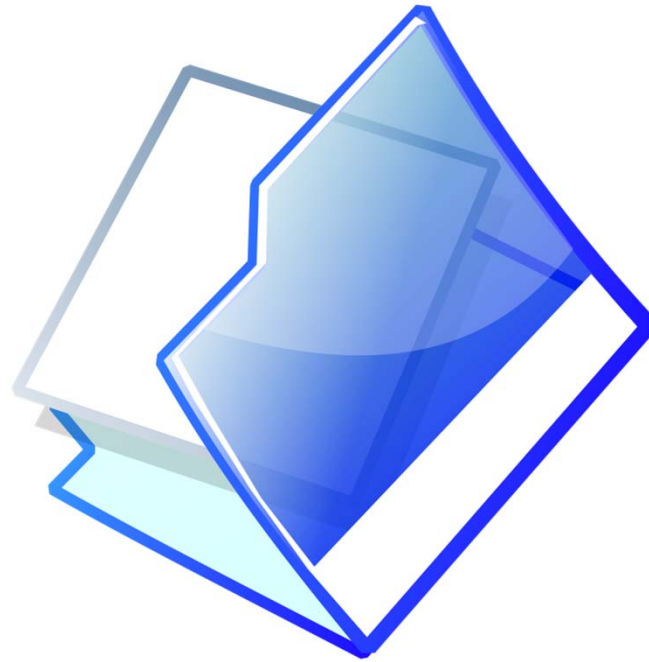
- Good for pre-screening, not so good for application assistance
- Create a template so clients can point to answers rather than saying them aloud
  - Ex. “Is your household income less than \$2,010 per month?”



No



# Electronic Information





## Electronic Information

- Never leave laptops or other devices unattended
  - Never leave them in a car, even hidden
- Do not use your personal phone for any client information (including photos)
- Password protect your work phone
- Do not email PII between devices
  - If you have a work phone, plug it in to your computer at the office to transfer data



## Promising Practices

- Always keep electronic devices password protected (TODr#1!)
- Use different passwords for every device
- Lock devices when not in use
- All client data needs to be encrypted (all devices must be encrypted)

# Printed Information







## Printed Information

- Scanning or copying: make sure documents are only handled by you or the client
- If you are collecting contact information for follow up have strips of paper for clients to write on and then put them in a locked box




# How to Protect Client Information in Reporting and Storytelling



## Sharing Client PII

- **Get a release**
- This includes advocating for the client with the county
- This includes reports for CAFB
- It also includes any storytelling you might create for your agency or stakeholders
- It applies to any pictures of clients on social media



Activity: Can you spot the PII?  
How would you fix it?

- Jane Smith came into our office today because she wanted to enroll in CalFresh benefits. Since she is 75 and lives alone (on Center St. near our office) with a limited income, we were pretty sure she would be eligible. We helped her apply and she was approved for benefits on 8/28/17.



## Spotted: PII

- **Jane Smith** came into our office today because she wanted to enroll in CalFresh benefits. Since she is **75** and **lives alone (on Center St. near our office) with a limited income**, we were pretty sure she would be eligible. We helped her apply and she was approved for benefits on 8/28/17.



Fixed: no more PII

- **Jane Smith** "JS" (not client's real name) came into our office today because she wanted to enroll in CalFresh benefits. Since she is **75** retired and **lives alone (on Center St. near our office) with a limited income** is a single person household with a limited income, we were pretty sure she would be eligible. We helped her apply and she was approved for benefits on 8/28/17.



**GPS**

**Get, Protect, Shred**



## Contact Information

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