

OCCUPATIONAL THERAPIST ASSISTANT AND PHYSIOTHERAPIST ASSISTANT EDUCATION ACCREDITATION PROGRAM

POLICY & PROCEDURES ACC-05: CONFIDENTIALITY

PREAMBLE

Individuals who conduct business on behalf of OTA & PTA EAP must be committed to the values of the organization, one of which includes the belief in transparent, consistent and fair practices. Ethical considerations demand that information acquired through participation in accreditation processes shall not be used for purposes other than those related to accreditation matters. In this way, all those involved in accreditation activities must respect confidentiality as a principle of good practice.

Participation in an on-site accreditation review, decision-making and all related processes and materials are considered to be of a highly confidential nature. Therefore, the Joint Accreditation Committee (JAC), Peer Review Team members and others are not authorized to discuss activities of the specific on-site review, or related documents and the findings of the on-site review except with other members of the PRT, OTA & PTA EAP staff and other OTA & PTA EAP representatives as appropriate.

1.0 POLICY

- 1.1 Individuals who participate in any aspect of OTA & PTA EAP activities must maintain the confidentiality of written and orally presented information received or produced as a result of the accreditation process. This includes but is not limited to:
- documents related to the accreditation process that are prepared by the education program, for example, the Self Study Report or Progress Reports;
 - documents that are prepared by OTA & PTA EAP or other individuals, for example, Peer Review Team Reports, Accreditation Dossiers;
 - proceedings of meetings of the JAC with respect to determining accreditation status of an education program;
 - discussions during accreditation on-site reviews with staff, faculty, students, clinicians and others; and
 - information about the outcomes of accreditation on-site reviews.
- 1.2 Any information or materials acquired through accreditation processes must not be used for purposes other than accreditation matters, unless permission is granted from the education program or institution, and the OTA & PTA EAP.
- 1.3 Any breach of confidentiality or unauthorized use of information shall result in dismissal from participation in the accreditation program.

2.0 PROCEDURES

2.1 JAC Members

- 2.1.1 Issues and expectations related to confidentiality will be discussed with all JAC members as part of orientation to the OTA & PTA EAP.
- 2.1.2 During discussions related to decision-making about a program's accreditation status, if a JAC member was a Peer Review Team Member he or she cannot provide new information about the on-site review or the Peer Review Team Report at the meeting.
- 2.1.3 At the end of JAC meetings, the Chair of the meeting will note any specific issues or documents related to confidentiality.
- 2.1.4 All Joint Accreditation Committee members will be asked to review OTA & PTA EAP's policy [ACC-05 Confidentiality](#) and [ACC-06 Electronic Storage of Confidential Data](#), and to sign a Confidentiality Agreement ([FORM-05](#)) once annually.
- 2.1.3 Joint Accreditation Committee members and ad-hoc committee members will be required to complete and submit [FORM-06 – Confirmation of Document Disposal - JAC](#) when requested following destruction of confidential materials.

2.2 Peer Review Team (PRT) Members

- 2.2.1 Issues and expectations related to confidentiality will be discussed with all PRT and ad-hoc committee members as part of orientation to OTA & PTA EAP.
- 2.2.2 All PRT and ad-hoc committee members will be asked to review OTA & PTA EAP's policy ACC-05 Confidentiality and [ACC-06 Electronic Storage of Confidential Data](#), and to sign a Confidentiality Agreement ([FORM-04](#)) prior to being given access to any confidential material.
- 2.2.3 Once a decision is taken about a program, PRT members shall be advised about the decision and will be asked to dispose of all materials related to the accreditation review by shredding, by deleting digital copies from all electronic devices, and/or by removing documents from any third-party data service provider. PRT members will be required to sign [FORM-06 Confirmation of Document Disposal – PRT](#) and return it to the OTA & PTA EAP to indicate how they have disposed of the materials

Policy Number: ACC-05	
Date of last revision	Associated documents
November 2016	Program Accreditation Handbook
	PRT Accreditation Handbook
	ACC-06 Electronic Storage of Confidential Data
	FORM-04 Confidentiality Agreement - PRT
	FORM-05 Confidentiality Agreement - JAC
	FORM-06 Confirmation of Document Disposal - PRT