Decision-Making Guide for Ethical Information Sharing

A structured framework for ensuring ethical confidentiality in client care
Step-by-Step Guide

Identi the Information Reque

Who is requesting the information?

- [ ] Court or probation officer
- [ ] Family member or guardian
- [ ] Healthcare provider or treatment team
- [ ] Law enforcement
- [ ] Other:

Does the request align with confidentiality policies?

- [ ] HIPAA (Health Insurance Portability and Accountability Act)
- [ ] 42 CFR Part 2 (Confidentiality of Substance Use Disorder Records)
- [ ] State or agency-s ecific privacy regulations
- [ ] Other:

Briefly describe the request and its purpose:

ssess Client Consent

Has the client provided signed release forms (ROI - Release of Information)?

- [ ] Yes (Attach documentation)
- [ ] No (Proceed to next question)

If not, does legal precedent override confidentiality?

- [ ] Yes – Mandated reporting (e.g., harm to self/others, child abuse)
- [ ] Yes – Court subpoena or legal requirement
- [ ] No – Client confidentiality should be maintained

Notes on consent and legal obligations:

Minimize Disclosure

- Share only the necessary information to fulfill the request.
- Use non-stigmatizing, factual language in disclosures.
- Redact unnecessary details before providing records.
- Advocate for client privacy whenever possible.

What specific information will be disclosed?

What information will be withheld to protect client privacy?

Document the Decision

- Who received the shared information?
- What details were disclosed?
- What legal or ethical justification supported the disclosure?
- Did the client express concerns about information sharing?

Final Documentation Notes:

Reflection & Compliance Review

1. Does this disclosure align with legal and ethical guidelines?
2. Did I consult with supervision or legal counsel if needed?

How can I better clarify confidentiality policies to clients in the future?