

Disclosure for Joan McGinnis, MSW, & Aging Well LLC

There are no Washington State laws that are specific to care management and care consultation, but I am subject to statutes as a licensed social worker. Please read this disclosure and our Services Agreement, and ask any questions that you may have regarding my services and your rights relevant to my services. Please sign in front of me.

Education & Licenses

I am licensed in the State of Washington as a *Licensed Independent Clinical Social Worker*, LW00005500, a *Member of the National Association of Social Workers (NASW)*, with a *Specialty Certification as Advanced Social Work Case Manager (C-ASWCM)* and an *Aging Life Care Advanced Professional*. I am recognized in the State of Washington as a *Geriatric Mental Health Specialist*, and as qualified supervisor for social workers. I have a Masters in Social Work (MSW) from the University of California, Berkeley. My clinical background includes over 30 years working with elders. Prior to that, I worked in the mental health system.

My practice is limited to care consultation and care management, for elders, the disabled, and their families. The goal of my services is, within the constraints of the client's current level of health, financial resources, and family support, to ***maximize the quality of life for the client.***

Confidentiality

(See Page 3 for *Client Confidentiality and Communication Technology and Practice standards for Aging Life Care Professionals* before you sign this disclosure.)

In the State of Washington, services provided by licensed social workers are subject to the confidentiality requirements under health-care laws. Hence, all consultation sessions and records of these sessions are confidential. The exceptions to the right of confidentiality, where the licensed social worker is required by law to disclose information are the following: (1) where abuse is suspected, and (2) where, because of mental illness, the client may be an imminent danger to him or herself, or an imminent danger to others.

Communication

In regards to confidentiality, communication via e-mail is inherently insecure. While I take precautions by using a privacy-focused email service, secure transmission and storage of email CANNOT be guaranteed. Please check and initial ONE of the following:

- I accept the risk to confidentiality, and want to communicate by e-mail (including invoices), as well as by phone calls and face-to-face.
- I want to communicate by only phone calls and face-to face, and have invoices sent by U.S.Mail.

Note keeping (please check and initial that you understand)

- My practice is limited to care consultation, care management, and care mediation sessions (typically with involved family members), and I follow the ethical and privacy guidelines of [Aging Life Care Professionals](#).¹ **While I keep brief notes for billing purposes and to jog my memory, I do not retain information that is regarded as healthcare or medical records.**²

Questions

Any time you are uncomfortable or confused about any care consultation service, I encourage you to ask questions and express your concerns. You may decline any care consultation service.

Agreement

I have read this disclosure statement and have had an opportunity to ask questions. I understand and accept the terms of the above policies. I have received a copy of this document. *Read page 3 (below), before signing:*

Client _____ Date _____

Care Consultant (LW00005500) _____ Date _____

¹ [http://www.aginglifecare.org/ALCA/About ALCA/Code of Ethics and Standards of Practice/ALCA/About Us/Code of Ethics and Standards of Practice.aspx](http://www.aginglifecare.org/ALCA/About%20ALCA/Code%20of%20Ethics%20and%20Standards%20of%20Practice/ALCA/About%20Us/Code%20of%20Ethics%20and%20Standards%20of%20Practice.aspx)

² According to the definition of “healthcare records” in the Washington Health Law Manual Third Edition: <http://www.wsha.org/our-members/resources-for-hospitals/washington-health-law-manual-third-edition/>

Please read before you sign the disclosure

From *Aging Lifecare Professionals Standards of Practice and Code of Ethics*

Confidentiality

The Aging Life Care Professional should maintain client confidentiality.

Rationale

The Aging Life Care Professional frequently needs to share information with others in order to fulfill his/her responsibilities. The Aging Life Care Professional utilizes knowledge of the client's physical and mental status, financial and legal affairs, and family and community supports to achieve maximum well-being for the client. Due diligence must be exercised at all times to protect the confidentiality of this information.

Guidelines

- A. The Aging Life Care Professional frequently needs to share information with others in order to fulfill his/her responsibilities. The Aging Life Care Professional utilizes knowledge of the client's physical and mental status, financial and legal affairs, and family and community supports to achieve maximum well-being for the client. Due diligence must be exercised at all times to protect the confidentiality of this information.
- B. The Aging Life Care Professional should maintain a valid authorization to exchange information.
- C. The Aging Life Care Professional should use discretion when sharing client information with others.
- D. The Aging Life Care Professional should not disclose identifying information when discussing clients for teaching, training or consultation purposes.
- E. The Aging Life Care Professional should explain to the client or designated decision maker that confidentiality may be waived if the Aging Life Care Professional believes it is necessary to protect the client from harming self or others.
- F. The Aging Life Care Professional has a responsibility to be familiar with, and abide by, all applicable state and federal laws and regulations regarding confidentiality and the client's right to privacy.

Communication Technology and Practice

The Aging Life Care Professional should take precautions to mitigate the inherent risk of using electronic communications.

Rationale

Technology has enhanced the ability of the Aging Life Care Professional to communicate with clients and client systems. The use of communication technologies presents challenges for the client and the Aging Life Care Professional.

Guidelines

- A. The Aging Life Care Professional needs to be sensitive to privacy concerns when interacting with clients/client systems on electronic and digital communication platforms.
- B. The Aging Life Care Professional should take steps to maintain privacy by being mindful of the environment in which the communication takes place.
- C. The Aging Life Care Professional and client/client system should discuss the pros and cons of various communication options in order to determine the preferred method for their particular situation.
- D. The Aging Life Care Professional should exercise caution when sending electronic information (e.g., having the correct e-mail address) and recognize the possibility of information inadvertently being misdirected.
- F. The Aging Life Care Professional should practice in a manner consistent with state regulations and agency policies regarding electronic communications.