ANR-01 - Privacy and Confidentiality in Daily Support - 2027

Student Guide | Printable learning and practice



Practice everyday decisions about private records, family requests, electronic messages and suspected privacy incidents. Adult and child examples help workers share information lawfully while protecting the person's dignity.

Planned duration: 1.0 hour. Credit requires verified completion of 60 minutes of assigned learning, activities and assessment. Record actual time. The video alone does not earn an hour.

Illustrated people and practice scenarios are fictional.

Your one-hour learning plan

Learning block	Required participation
30 minutes	Narrated instruction plus guided reading and written comparison. Use the remaining time after the video to read the topics and legal notes carefully.
20 minutes	Case work, application practice, feedback and revision. The timed steps below total 20 minutes.
10 minutes	Random 10-question assessment from a 30-question bank; review explanations and correct misunderstandings.

Learning objectives

1. Recognize private information in everyday support.
2. Verify who may receive information and why.
3. Use secure communication and respond promptly to privacy mistakes.

How completion is verified

Record actual learning time and exclude breaks. Award the planned hour only after 60 minutes of required learning and all completion checks are verified. Otherwise record actual time and remaining work. Complete both case worksheets and the application task. Pass at 80% or higher: at least 8 of 10 correct. Correct safety-critical errors with the instructor or supervisor. Practical skills and person-specific competency require the applicable separate verification.

Timing note

The narrator’s pace affects video length. After conversion, the administrator records the actual video duration and assigns the remaining portion of the 30-minute block to guided reading. Learners who finish early use the extension task; learners who need more time receive it. Do not award an hour for a short video or quiz alone.

Guided reading task

Compare each case with your organization’s privacy policy. Locate the person who approves unusual disclosures, the approved messaging system and the process for reporting an error. Write the exact policy location. Identify an adult representative document and a child custody or consent question that would require further review. Use fictional details only.

Privacy in ordinary moments

Slide 3

Conversations, photographs and routines can reveal private information.

Professional access requires a work-related purpose.

Privacy concerns begin long before a record is opened. A neighbor may learn that someone receives disability services from a casual conversation. A photograph may show medication packaging in the background. A schedule may identify where a child receives treatment. Think about what another person could learn from the complete situation. Removing a name may still leave enough details to identify someone. Your responsibility includes spoken information and what other people can see. During this lesson, use fictional examples. Keep actual names and identifying details out of group discussion and course worksheets.

The rules that apply

Slide 4

245D requires annual privacy training.

Minnesota law, applicable federal rules and company procedures work together.

Minnesota requires staff in licensed home and community services to understand data privacy responsibilities. Federal health privacy rules also apply when the organization or the information falls within their scope. Do not assume every organization has exactly the same legal status. Your employer should explain which requirements apply and who answers privacy questions. Follow its approved procedures for records and communication. A familiar practice may still be inappropriate. When a request falls outside your normal duties, preserve the information and contact the designated privacy lead. A confident caller does not establish legal authority.

Information needed for the assignment

Slide 5

Open records needed for your assigned work.

Avoid curiosity access, even for familiar people.

Access to a record system is a tool for performing assigned duties. It is not permission to look at every record in the system. Before opening information, identify the task you are completing. A worker helping with a meal needs the current food and swallowing instructions assigned to that role. That worker does not automatically need unrelated historical records. A supervisor may need a broader view to review services. Follow role-based access rules and ask when access appears broader than your duties. Looking up a friend, neighbor or former participant out of curiosity is inappropriate.

Purpose and authority

Slide 6

Identify the recipient and the reason for disclosure.

Confirm consent or another lawful basis before sharing.

A useful privacy decision begins with the purpose of the request. Determine what information is being requested and how the requester will use it. Then verify the requester through an approved method. Use contact information from a trusted record when a message seems unusual. Next, check whether the person has authorized the disclosure or another legal basis permits or requires it. The existence of a support relationship does not answer every disclosure question. If you cannot verify authority, explain that you must confirm the request. Contact the appropriate person without sending the requested information prematurely.

Minimum necessary and its limits

Slide 7

Limit information according to the purpose and applicable rule.

HIPAA has exceptions, including provider treatment disclosures and disclosures required by law.

Privacy practice includes limiting information to what is appropriate for the purpose. Federal minimum necessary requirements have specific exceptions. For example, the federal standard does not apply in the same way to disclosures to health care providers for treatment. Disclosures required by law also have an exception. This does not mean every coworker may access everything or every treatment-related request is genuine. Verify identity and follow the applicable procedure. Workers should avoid inventing an absolute rule that blocks necessary care or a required report. Ask the privacy lead when the legal basis or permitted scope is unclear. Minnesota health-record rules can require written consent even when federal privacy rules would permit a disclosure. Apply both applicable laws and their exceptions.

Family requests and adult choice

Slide 8

Family involvement does not automatically grant unrestricted access.

Check the person’s wishes and the representative’s actual authority.

An adult may want a family member involved in certain conversations and prefer other information to remain private. Respect that distinction. A family relationship alone does not establish unrestricted access to records. Review any authorization and the documented authority of a legal representative. Authority can be limited to particular decisions. Where applicable law allows sharing information relevant to a family member's involvement in care, follow the organization's process. Do not promise either unlimited access or a complete refusal before checking. Include the adult in the conversation using their communication method whenever possible.

Children and legal representatives

Slide 9

Verify parental, guardian or other representative authority.

Some services and records have special minor-consent protections.

Privacy decisions involving children require attention to the type of service and the person's legal authority. A parent is commonly a child's personal representative, but exceptions can apply. Certain services that a minor may legally consent to can have different access rules. Court orders and custody arrangements can also affect who may receive information. Staff should not decide these questions from assumptions about who brought the child to an appointment. Verify the current documents and consult the designated lead. Explain the process respectfully. Protect the child's safety while following required reporting duties and applicable access rights.

Respectful handoffs

Slide 10

Share relevant support instructions in a private place.

Separate observations from assumptions.

A useful handoff tells the next worker what they need to provide safe and consistent support. Describe what happened, what the person communicated and what action remains. Avoid unnecessary details about unrelated family issues. Move the discussion away from visitors and public areas when possible. Speak respectfully even when the person is not present. An objective statement about a missed meal is more useful than a judgment about being difficult. Confirm that the receiving worker understands urgent instructions. Privacy should support continuity of care. It should not become an excuse to omit essential information from an authorized handoff.

Phones, photographs and messages

Slide 11

Use approved devices and communication channels.

Check recipients and attachments before sending.

Personal devices can create risks when records mix with private photographs or automatic cloud backups. Use the channels and devices your employer approves. Before sending a message, check the recipient and the attached file. A familiar name may belong to the wrong contact. Avoid placing private details in group messages when some members have no need to know. Photographing someone for care documentation requires the applicable authority and approved process. A photograph taken for care does not automatically become available for marketing. Do not post stories from work on personal social media, even when you believe the story is positive.

Paper and shared spaces

Slide 12

Secure records during use, transport and disposal.

Keep screens and printed material away from unauthorized viewers.

Paper records need protection during ordinary transitions. A folder left in a vehicle or a printer tray can expose information. Carry only what you need and use the approved transport process. Lock the screen when stepping away. Position workstations so visitors cannot easily read private information. Use the organization's secure disposal process for documents that no longer need to be retained. Do not place confidential pages in ordinary recycling. At home-based services, agree on a secure storage location that authorized workers can access. The person's home should remain a comfortable living space while records stay protected.

Requests for access and correction

Slide 13

Help the person use the approved request process.

Preserve the original record and an accurate correction history.

People have rights concerning information about themselves under applicable law. When someone asks to view a record or correct a statement, help them reach the responsible staff member. Avoid dismissing the request because you disagree with it. Staff should not secretly rewrite completed records to remove a mistake. Follow the correction procedure so the original entry and the reason for correction remain traceable. Identify a late entry honestly. If a factual disagreement remains, the privacy or records lead can explain the applicable process. Your role is to support access and maintain an accurate record, not obstruct a person's request.

Required safety disclosures

Slide 14

Report suspected maltreatment immediately, no later than 24 hours.

Use the required adult or child route without waiting for consent.

Privacy rules do not eliminate duties to report suspected maltreatment. Report immediately through the proper channel. This means as soon as possible, with the outer deadline stated in the guide. Do not delay while seeking permission from a person accused of causing harm. Emergency responders may need information about a person's immediate health needs and communication supports. Follow emergency procedures and communicate what is necessary for their response. Avoid broadcasting details to people who are not involved. Document required disclosures according to policy. If a supervisor gives an instruction that would delay a legally required report, use the reporting process and seek appropriate help with the conflict.

A possible privacy incident

Slide 15

Contain the exposure when safe and report promptly.

Preserve facts; the privacy lead determines required notifications.

Suppose a document goes to the wrong recipient. Act promptly rather than hoping the recipient will ignore it. Follow the approved steps to contain the disclosure, such as asking the recipient not to use or forward it. Notify the designated privacy lead and preserve the facts. Record what information was involved, who received it and what you have done. Do not decide on your own that the event is too small to report. The organization needs the facts to assess applicable notification duties. Do not erase evidence, alter the record or promise that a harmful disclosure can always be undone.

Privacy across service models

Slide 16

The authorized service and record determine the applicable process.

A worker with several roles must keep permissions separate.

Someone may work for a licensed disability provider and also provide personal care services. The worker's knowledge travels with them, but permissions do not automatically transfer between jobs. Identify which organization holds the record and which role you are performing. Use the current service plan and that employer's privacy process. A shared supervisor does not make every disclosure appropriate. Likewise, a family member directing personal care does not gain unlimited access to unrelated service records. When services overlap, obtain clarification about lawful coordination. Keep professional information in the correct approved system and avoid creating informal collections on personal devices.

Accountability and daily habits

Slide 17

Use a repeatable purpose, authority and recipient check.

Report concerns and complete assigned corrective learning.

Reliable privacy practice depends on habits that work during a busy shift. Before sharing, identify the purpose, verify authority and check the recipient. After using records, secure them. When a mistake occurs, report it promptly and participate in corrective learning. Managers should make approved channels easy to use and respond to questions without discouraging staff. A course quiz helps test understanding, but local practice must also be reviewed. In your activity, explain a disclosure decision in plain language. Your explanation should show who needs the information, why they need it and what process supports the decision.

Legal notes and decision aid

These notes preserve exact written deadlines and references. Narration uses plain language instead of reading statute numbers or contact numbers aloud.

245D.09, subd. 5 incorporates privacy training from subd. 4(3).

Minnesota Government Data Practices Act provisions and Minnesota Health Records Act requirements must be applied according to their scope.

HIPAA minimum necessary exceptions do not eliminate identity verification, lawful authority or reasonable safeguards.

Maltreatment reporting is immediate: as soon as possible, no later than 24 hours. Apply 626.5572, subd. 10 or 260E.03. This deadline is distinct from the employer privacy-incident procedure.

144.293 generally requires signed, dated consent for release of covered health records unless a Minnesota-law exception applies. HIPAA permission alone does not establish Minnesota consent authority. Under 245D.04, subd. 3(a)(1), the person has the right to be advised of disclosures.

Before access	Identify the assigned task and the records needed.
Before disclosure	Confirm purpose, identity, authority and approved method.
After use	Secure records and devices.
After an error	Contain when possible, report promptly and preserve the facts.

Apply the law to the actual assignment

Use current employer procedures and the person’s plan. A course title or completion certificate does not independently authorize a clinical task, restrictive intervention or new licensed role. This 2027 edition reflects enacted law and published guidance reviewed on October 14, 2026. Later changes must be checked before delivery.

Case 1: A family request during an outing

Practice allocation: 6 minutes. Read, decide, write and explain.

Mara supports an adult named Luis at a community center. Luis's sister calls Mara's personal phone and asks for a photograph of his medication record. She says she helped with his care years ago and wants to check a recent change. Luis is nearby and can communicate his preferences with extra processing time. Mara has not checked the current authorization or any representative documents. Other people at the center can hear the call.

1. Identify what is known and what remains unverified.

_____

_____

2. Draft a respectful response to the sister.

_____

_____

3. Describe how to involve Luis and verify authority.

_____

_____

4. Explain how any lawful disclosure would be made securely.

_____

_____

Case 2: A message about a child goes to the wrong group

Practice allocation: 6 minutes. Read, decide, write and explain.

A worker sends a shift message about a child to a group conversation that includes former employees. The message describes a health appointment and includes a screenshot of a support instruction. The worker realizes the error immediately. Another worker suggests deleting the message and saying nothing because everyone in the group once worked for the agency.

1. List the immediate containment and reporting steps.

_____

_____

2. Explain why former employment does not establish current access.

_____

_____

3. Write a factual incident summary without inventing consequences.

_____

_____

4. Identify who evaluates notification duties and follow-up.

_____

_____

Application and feedback

Practice allocation: 8 minutes. Total practice: 20 minutes.

Work through both cases. Spend time drafting the words you would actually say and the actions you would take. Then compare your answers with the discussion guidance. Revise any answer that relies on a family relationship, urgency claimed by a caller, or past employment as the sole reason to disclose. Finish by explaining your decision to a colleague or supervisor.

Minutes 1–3	Draft the requested checklist, response or plan. Use fictional details.
Minutes 4–6	Explain or rehearse the response. Use a qualified trainer for required skills. Self-study learners write their explanation and compare it with the guide, then submit unresolved questions.
Minutes 7–8	Record feedback, correct a weak decision and identify a follow-up action.

My application response

_____

_____

_____

_____

Feedback and correction

_____

_____

_____

Discussion guidance

Read after completing your own case responses. Identify the reasoning behind the action, not just the final answer.

A family request during an outing

Move the discussion to an appropriate private setting. Involve Luis through his preferred communication method. Verify current authority and the applicable disclosure process. Do not send a photograph from a personal phone merely because the caller is a relative. If information is lawfully shared, use an approved method and the appropriate scope. The correct response protects privacy while preserving a route for legitimate family involvement.

A message about a child goes to the wrong group

Use the approved incident process immediately. Preserve facts about the information and recipients. Attempt authorized containment without assuming deletion removes every copy. Notify the privacy lead so the organization can assess duties and risk. Former employees may have no current need or authority to receive the information. Complete corrective steps and review how group membership and approved messaging are managed.

If you finish a learning block early

Apply the same decision to a different age group or communication need. Identify a fact that would change the response. Compare the legal requirement with the employer’s procedure. Write an objective record of the action and an unresolved question. Use this extension to deepen learning within the assigned time.

Safety-critical review

Explain the immediate safety action, the limit of your role and the reporting or escalation route. If any of these are unclear, seek instructor or supervisor feedback before applying the learning. A quiz pass does not erase an unresolved safety concern.

Sources and further reading

Use the primary legal text and the linked DHS implementation guidance together. A prior-year statute page may show amendments in its recent-history links. Course examples are teaching illustrations, not legal findings about a real event.

Minn. Stat. 245D.09 - Staffing and training

https://www.revisor.mn.gov/statutes/cite/245D.09

Minn. Stat. 245D.04 - Service recipient rights

https://www.revisor.mn.gov/statutes/cite/245D.04

Minn. Stat. 245D.095 - Records

https://www.revisor.mn.gov/statutes/cite/245D.095

Minnesota Government Data Practices Act, chapter 13; including 13.01-13.10 and 13.46

https://www.revisor.mn.gov/statutes/cite/13/full

Minnesota Health Records Act, 144.291-144.298; release provisions

https://www.revisor.mn.gov/statutes/cite/144.293

HHS - HIPAA minimum necessary requirement

https://www.hhs.gov/hipaa/for-professionals/privacy/guidance/minimum-necessary-requirement/index.html

HHS - Family members and friends

https://www.hhs.gov/hipaa/for-individuals/family-members-friends/index.html

HHS - Personal representatives

https://www.hhs.gov/hipaa/for-professionals/privacy/guidance/personal-representatives/index.html

Minn. Stat. 626.5572 - Vulnerable adult definitions

https://www.revisor.mn.gov/statutes/cite/626.5572

Minn. Stat. 260E.03 - Child maltreatment definitions

https://www.revisor.mn.gov/statutes/cite/260E.03

Learning and completion record

ANR-01 - Privacy and Confidentiality in Daily Support - 2027

Planned duration	1.0 hour. Actual time and completion must be verified.
Learner / date	_____
Instruction + reading	Video minutes: _____ Reading minutes: _____ Total: _____
Applied practice	Case 1: _____ Case 2: _____ Application/feedback: _____
Assessment	Minutes: _____ Score: _____ / 10 (minimum 8 correct)
Total actual time	_____ minutes, excluding breaks
Instructor / reviewer	Name: _____
Qualifications	_____
Required skill follow-up	_____
Credited time	_____ hours supported by actual learning evidence
Completion verified	All required work complete: ____ Signature/date: ____

My next action

_____

_____

_____

Provider verification

The employer determines legal applicability, instructor qualifications and any required observed or person-specific competency. Record only training actually completed. This guide does not claim DHS approval or an independently accredited continuing education award.