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| **Institutional Handbook of Operating Procedures** Annual Notice Policy CPE – 100-3 |
| Section: Clinical Pastoral Education Guidelines  | Responsible: Spiritual Care Director  |
| Subject: Clinical Pastoral Education **Annual Notice** | Responsible Entity: Department of Spiritual Care |

1. **Title**: Clinical Pastoral Education Annual Notice
2. **Scope:** This policy applies to Clinical Pastoral Education (CPE) students and Certified Educator Candidates who participate in the University Health CPE program, pre-provisionally accredited for Level I/II and pre-provisionally for Certified Educator training.
3. The ACPE CPE Center at University Health will protect the privacy concerns of each student through careful, confidential record keeping and maintaining students records for ten years. **Directory Information is student information not generally considered harmful or an invasion of privacy if released.** University Health adheres to the following ACPE CPE mandates:
4. Annual Notice must be published annually prior to the start of any CPE program and be included in the handbook, in addition to other sources, at the center’s discretion. Publishing may include posting the Annual Notice on the center’s website.
5. **This ACPE CPE center/program guarantees to its students the right to inspect and review education records, to seek to amend them, and to specify control over release of record information.**
6. **Directory information and how to opt out:** Directory information is: name, address, type of CPE unit, email, telephone, date of birth, occupational status during CPE, gender, religion, previous education, and photograph. All other information is released only with the students written, signed, and dated consent specifying which records are being disclosed, to whom and for what limited purpose. The student can restrict directory information and/or record access at any time during their attendance. Restrictions must be honored even after their departure. Before releasing information, students must have received the Annual Notice.
7. The definition of student records (ACPE’s definition must be used; the center can add additional items):
	1. The student’s education file contains the following: application face sheet and essays, the ACPE Certified Educator's evaluation report as well as the participant's evaluation report, relevant correspondence concerning the participant's acceptance, the training agreement, and any permission to release information. The center retains the following items indefinitely as the permanent record and these contents may be released only at the specific written request of the participant:
	2. The application face sheet
	3. The [Use of Clinical Materials Consent Form](https://cdn.manula.com/user/4287/docs/use-of-clinical-materials-consent-form.docx)

The center retains the following items from the student record for ten (10) years:

* 1. Certified Educator’s end of unit evaluation and ACPE confidential evaluation cover sheet
	2. The student’s response to the end of unit evaluation, if submitted
	3. The student’s self-evaluation.
1. **Records Management protocol:** The Clinical Pastoral Education Center at University Health maintains participant files in compliance with ACPE standards and guidelines for confidentiality and privacy. The participant's permanent official file is available to the participant on request and is not available to persons outside the center without the specific written consent of the participant. The ACPE Educator, ACPE Educator Candidate, or administrative assistant (by request of ACPE Educator) has access to the permanent student files.
2. **A student has the right to object to record content. If not negotiable, the written objection will be kept with and released with the record.**
3. Within University Health, these people may have access to student records without student consent:
	1. **Education Officials:**
		* CPE faculty—ACPE Certified Educator(s) or Certified Educator(s) Candidate(s) employed or contracted by University Health to provide direct supervision of CPE students and/or administer the CPE Center.
		* The Manager and/or Supervisor of CPE and Spiritual Care Administrative Assistant (s) for the purpose of sending out student records upon request of the student and/or for maintenance of records
		* Members of the University Health CPE Program Professional Advisory Group delegated to review the student records during periods of CPE Center Accreditation Review and/or complaints or grievances
		* The Spiritual Care Staff, and/or members of the University Health CPE Program Professional Advisory Group for the purpose of admission interviews and exit interviews.
	2. **Legitimate Education Interest***:*
		* Activities delegated to the CPE Program Administrative Support Assistant to maintain student records in accordance with the CPE Program’s CPE Policy for Maintenance of Student Records
		* Review of contents of student records related to program administration by persons authorized by ACPE
		* Review of records for ACPE accreditation processes
		* Review of student records content by University Health CPE faculty and/or University Health PAG for the purposes of Certified Educator Candidate (s), peer consultation/review
		* Review of any complaints or grievances
		* Review of contents for admission and exit interviews
4. Violations of Annual Notice protocols may be reported to the Chair of the Accreditation Commission at:
	1. ACPE: The Standard for Spiritual Care and Education
	1 Concourse Pkwy, Suite 800
	Atlanta, GA 30328.

Or via email: Accreditation@acpe.edu

**REFERENCES:**

ACPE Standard 4.1.d

ACPE Manual: Accreditation Commission Forms