

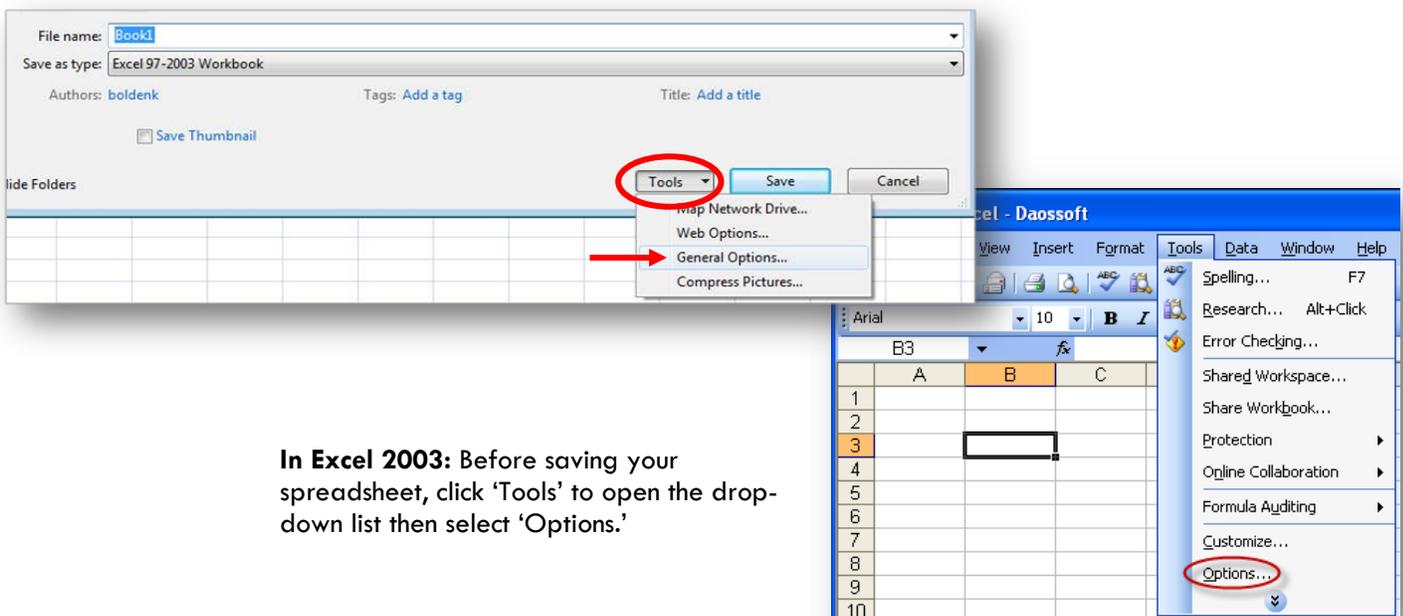
PROTECTING CLIENT CONFIDENTIALITY

Ideally, any confidential client information being sent by email would be sent through an email encryption program. If you don't have encryption software, this information **MUST** be sent as an attached, password-protected document. Always send the password in a separate email.

- Confidential client information includes: name, date of birth, or any details that could potentially be used to identify a client.
- ServicePoint client ID numbers are **not** considered protected client information. They can be sent directly in the body of an email.
- When communicating by email with the ServicePoint team regarding a client, **always refer to the client using the ServicePoint client ID whenever possible.** This will both protect client confidentiality and avoid any confusion about clients with similar names.

PASSWORD PROTECTING AN EXCEL SPREADSHEET

- ❶ In Excel 2007 or newer: Before saving the spreadsheet, click the 'Tools' button right next to the 'Save' button.
- ❷ Select "General Options" from the drop down menu.



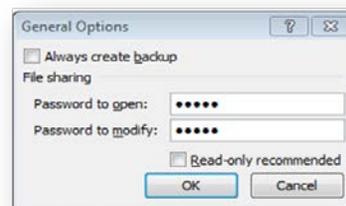
In Excel 2003: Before saving your spreadsheet, click 'Tools' to open the drop-down list then select 'Options.'

- ❸ In either version of Excel, the next window that opens will ask you for a 'Password to Open' and a 'Password to Modify.' If you would like the recipient to be able to both open and make changes to this spreadsheet, enter the same password in both fields.

If you want the recipient to only see the spreadsheet but not make changes to it, enter a 'Password to Open' and click the 'Read only recommended' box.

- ❹ You will be asked to **confirm** both passwords. Re-enter the same passwords and click 'OK.' The spreadsheet can then be saved and attached to an email.

Excel 2007:



Excel 2003:

