



UWDC 211 Confidentiality Agreement and Confidentiality Protocol

United Way 211 adheres to a strict confidentiality protocol as follows:

- UWDC 211 defines confidential information as any information about any caller that could be personally identifying (such as name, age, race, address, phone number, case history, etc.), any information regarding the nature of an inquiry (what information and/or referrals were requested and/or provided), any information about any service that is not published publicly (such as office locations of confidential services, etc.), the physical location of the UWDC 211 Call Center, and the identities of the staff or volunteers of UWDC 211.
- Staff and volunteers will receive initial training in the Confidentiality Protocol which is reviewed and signed annually.
- Staff and volunteers responding to calls at UWDC 211 may consult with a supervisor or co-worker through the 211 Call Center Support Teams channel, but otherwise discussion of calls is limited to the UWDC 211 office and staff meetings. Call specifics should not be discussed with friends, family, or co-workers outside the UWDC 211 office or work environment.
- All notes taken during the call that include any personal information about the caller must be shredded before leaving the Call Center or entered into the call record. No written notes may leave the Call Center or be retained off site.
- It is not allowed to share information about previous calls with any caller. This applies to all callers, regardless of age or legal status. Family, friends, spouses, partners, co-workers, police, medical personnel etc. have no right to know whether someone has called 211 or the content of any specific calls without the client's prior verbal and informed consent.
- It is not allowed to make any contact either by phone or in-person with a client, except under specific circumstances that may require re-contact (i.e. suicidal person hanging up, crisis call disconnected, etc.)
- Calls are recorded and monitored for training purposes. They are deleted after 2 weeks. The Confidentiality Agreement applies to all recorded calls as well.
- Staff and volunteers are expected to remain faithful to the Confidentiality Protocol after they leave UWDC 211, by never discussing specific callers or details of conversations outside an agency context.

In accordance with the Inform USA Accreditation Standards (1.11), UWDC 211 requires that caller confidentiality must be maintained at all times, with the following exceptions:

- When the release of information is required by law; or
- When careful consideration indicates the presence or risk of serious harm to the caller or another person, and then information may only be released to those who must be informed to reduce harm or risk; or
- When the caller has given explicit verbal permission for the information to be disclosed to another person or agency. The caller should specify what information may be given and to whom.

If a caller has complaint about United Way 211's Confidentiality Protocol, it needs to be reported on the Inquiry Concern Form and United Way 211 Supervisor will inform the caller on the content of the Protocol.