

## United Way 2-1-1 Confidentiality Protocol and Confidentiality Agreement

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United Way 2-1-1 adheres to a strict confidentiality protocol as follows:

- United Way 2-1-1 defines confidential information as any information about any inquirer that could be personally identifying (such as name, age, race, address, phone number, case history, etcetera), 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, etcetera), the physical location of the United Way 2-1-1 Call Center, and the identities of the volunteers of United Way 2-1-1.
- United Way 2-1-1 requires that any person entering the United Way 2-1-1 Call Center, including visitors, volunteers, service-learning students, interns, and staff, must read United Way 2-1-1 Confidentiality Protocol and sign a copy of Confidentiality Agreement.
- Staff and volunteers will receive initial training about the Confidentiality Protocol which is reviewed and signed annually.
- Staff and volunteers responding to calls at United Way 2-1-1 may consult with a supervisor or co-worker, but discussion of calls is limited to the United Way 2-1-1 office and staff meetings. Call specifics should not be discussed with friends, family, or co-workers outside the United Way 2-1-1 office.
- All notes taken during the call that includes any personal information about the caller must be shredded before leaving the Call Center.
- It is not allowed to share information about previous calls to 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 or not someone has called 2-1-1 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.
- Calls are recorded and monitored for training purposes. They are deleted after 2 weeks. Confidentiality Agreement applies to all recorded calls as well.
- Staff and volunteers remain respectful of the Confidentiality Protocol after they leave United Way 2-1-1, by never discussing specific callers or details of conversations outside of an agency context.

In accordance with the Alliance of Information and Referral Systems, Inc. Accreditation Standards (1.11), United Way 2-1-1 requires that inquirer confidentiality must be maintained at all times, with the following exceptions:

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

If a caller has a complaint about United Way 2-1-1's Confidentiality Protocol, it needs to be reported on the Inquiry Concern Form and United Way 2-1-1 Supervisor will inform the caller on the content of the Protocol.