



## Client Confidentiality & Privacy Policy Agreement

Updated: 10.2022

In your unique role as volunteer, you may have access to information about **Community Action House (CAH)**, or its clients, customers, donors, or community partners. This information must be kept confidential. Due to the sensitive nature of such information, it is our expectation that no information will be shared directly or indirectly with another individual or organization outside of CAH without a signed Release of Information. Information is to only be used in the performance of a volunteer's role as outlined in their job description or work project and not to be shared or used for personal, professional purposes or monetary gain. Confidential information includes, but is not limited to the following:

- Client lists and identifying information (including but not limited to contact info, demographics, service dates and types)
- Information relating to the client's family
- Information regarding a client's service attendance or status as a client at our agency
- Donor lists (including but not limited to contact info, donation dates and amount)
- Volunteer lists (including but not limited to contact info, participation in volunteer shifts)
- Customer/Vendor Lists or Price Lists
- Product Costing Information
- Marketing Strategies
- Pending Projects, Proposals, and Patents
- Proprietary Production Processes
- Research and Development Projects and Drawings
- Financial Records
- Program and Agency level Reporting and Billing
- Human Resource Records and Health Care Records
- Staff / volunteer work schedules

If there is uncertainty about whether information is confidential, the volunteer should always check with their immediate supervisor or point of contact before discussing with anyone outside of the agency. Anyone found in violation of this policy will be subject to discipline up to, and including, termination of working agreement and may also be subject to prosecution to the fullest extent permitted under the law.

**By signing below, I have read, understand, and agree to the Community Action House Client Confidentiality & Privacy Policy, and agree to abide by the following provisions:**

- All communications between staff, volunteers and clients are confidential.
- Volunteer shall not disclose confidential information to a third party without the client's knowledge and consent to release such information.
- Volunteer should not discuss confidential information in any setting unless privacy can be ensured. Information should not be discussed in public or semi-public areas.
- Failure to abide by the terms of this Confidentiality Agreement may result in the termination.

Volunteer Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Volunteer Printed Name: \_\_\_\_\_