

Case Conferencing Confidentiality Agreement

- I. Case Conferencing (CC) refers to a group of social service providers and other professionals (participants) working together to resolve issues faced by low-income, at-risk, and homeless community members (clients). During these discussions, sensitive information is discussed with the purpose of helping individuals and families access the services they need to resolve their housing and any other crisis they may be experiencing. Such information includes but is not limited to personally identifiable information, health information, housing status, domestic violence status, etc.
- II. Due to the sensitive nature of the information discussed, it is required that all participants in case conferencing enter into a confidentiality agreement. By entering into this agreement, you agree to the following:
 - Any and all information you gather during any CC session is kept confidential and used only for the purpose of providing direct services to individuals and families
 - If joining virtually, you must be in an isolated/private room to prevent unauthorized persons overhearing or seeing confidential information they are not approved to see or hear
 - Any information you gathered during the CC sessions can only be communicated via secure methods outside of CC (e.g. encrypted emails, secure file transfer protocols, or physical delivery with appropriate security)
 - No personally identifiable information can be shared referencing any person fleeing, or attempting to flee domestic violence, dating violence, sexual assault, stalking, or human trafficking (DV client), NOR can any information be shared on any client who has explicitly declined participation in sharing
 - These persons can only be discussed using a unique identifier, usually a database ID number, previously agreed upon by the CC lead and the agency handling said client
 - You may share only information that is absolutely necessary for providing care to a client
 - Any of your written or typed notes gathered during the CC sessions must be stored securely in a locked cabinet or locked computer located in a locked office that is accessible only to authorized agency personnel
 - Any information you collected that does not pertain to a client you are working with or can provide direct services to must be destroyed prior to leaving any CC session
 - The best practice is to only take notes on cases you can provide direct assistance to or are working directly with
 - You must report any breach of confidentiality from any participating individual or agency to the CC lead immediately
 - You agree that any substantiated breach of client confidentiality will be reported to authorities with the full cooperation of the CC lead and any CC participants
 - Failure to abide by these terms will result in termination from all coordination meetings and coordinated assessment activities and your employer will be notified
- III. You must maintain the following code of conduct during CC sessions and other community events or group gatherings:
 - Treat partner agencies with respect, fairness, and good faith
 - Maintain high standards of professional conduct in the capacity as a CC participant
 - Make every effort to ensure client information is handled securely, responsibly and in accord with the client's wishes
 - Relate to clients of partner agencies with full professional consideration
 - Refrain from making discriminatory comments based on race, color, religion, national origin, ancestry, handicap, age, sex, and sexual orientation
 - Act without intent to defraud the federal, state, or local government or any individual entity; or to conduct any illegal activity; or to solicit clients for personal gain

Participant Name: _____

Agency: _____ **Position:** _____

Email: _____ **Phone:** _____

Signature: _____ **Date:** _____