

## *Confidentiality, Communication Standards & Ethical Conduct*

### **Confidentiality Policy**

Client information must be protected at all times.

As a member of our intake team, you will:

- ✓ Handle client data with care
- ✓ Keep all information secure and private
- ✓ Use only approved systems to store or send information
- ✓ Protect all documents, forms, phone numbers, and communications

 **Recording or saving client information outside of the firm's software is strictly prohibited.**

---

### **Prohibited Actions**

To protect our clients and meet ethical standards, you **must not**:

- Provide legal advice
- Give legal opinions
- Interpret or explain legal documents
- Promise or guarantee legal outcomes
- Discuss legal strategy
- Negotiate or quote fees beyond approved scripts
- Share client stories or details outside the firm
- Save screenshots, photos, or copies of client files

---

### **Authorized Communication Only**

**The specialist may only communicate information that is provided by the firm through approved scripts. Any unauthorized statements, legal information, or fee discussions are prohibited. The specialist must not provide legal advice, legal opinions, fee quotes, or promises of results.**

---

## Professional Communication Standards

During every call, text, and email, the specialist must demonstrate:






- ✓ Warmth and empathy
- ✓ Professional tone
- ✓ Patience and respect
- ✓ Confidence without advising
- ✓ Clear and concise communication
- ✓ Proper grammar in English & Spanish

 Your goal is to **guide clients to the attorney**, not advise them.

---

## Data Security Requirements

To comply with confidentiality standards, you must:

-  Use secure login credentials
  -  Enable two-factor authentication when required
  -  Maintain a private, quiet, secure workspace
  -  Use a stable internet connection and headset
  -  Never share passwords, links, or client documents with anyone
- 

## Violation of These Rules

Any violation of confidentiality or communication restrictions may result in:

- Immediate termination of the contract
- Removal of access to client information