

## ***Submitting a Confidentiality Form***

Sometimes it is necessary to share ANDI data with non-foundation employees and volunteers in order to achieve fundraising goals. Before that information can be shared, the employee or volunteer must submit a confidentiality agreement indicating they have read and agree to UTFI's data confidentiality policies.

1. Confidentiality forms are located at [services.utfoundation.org](https://services.utfoundation.org).
2. Click on the "Policies" link in the menu at the top. You will be asked to enter your net ID and password.
3. Scroll to the bottom of the page. Confidentiality forms are located under "ANDI Security Forms" in the right column.

### **ANDI Security Forms**

- [Data Confidentiality & ANDI Access Agreement for Staff](#)
- [Data Confidentiality Agreement for UT Employee/Volunteer](#)
- [Data Confidentiality Agreement for UT Vendors](#)

4. "Data Confidentiality Agreement for UT Employee/Volunteer" should be used for non-foundation employees and volunteers. Click on the link to access the form.
5. Under "Foundation Staff Information", fill out your information and reason for requesting access for the employee or volunteer.
6. Under "UT Employee/Volunteer Information", enter information for the individual that needs to sign the agreement.
  - a. The employee or volunteer will receive notification via email, so make sure the email is entered accurately.
  - b. Confidentiality form indicators are now in ANDI. Make sure to enter the accurate ANDI ID number so that the indicator will display on the correct record.
7. Once all of the information is entered, hit "Send".

8. The employee or volunteer will receive an email notification in order to complete the form.
  - a. It is recommended to alert the employee or volunteer to expect an email from the “University of Tennessee Foundation – ANDI Help Desk”.
  - b. These emails can sometimes end up in the individual’s spam folder. Let them know to check the spam folder if they do not find it in their inbox.
  - c. Recipients will receive automatic reminder emails if they do not complete the form. The emails will be sent after two and four days.
  
9. Once the employee or volunteer completes the form, Advancement Services will be notified to approve it. Once it is approved, both the foundation staff and the employee/volunteer will be notified by email.
  
10. Any questions about what type of information can or should be shared with non-foundations staff should be directed to Advancement Services (email: [ask@utfi.org](mailto:ask@utfi.org)).

### **Confidentiality Form Indicator**

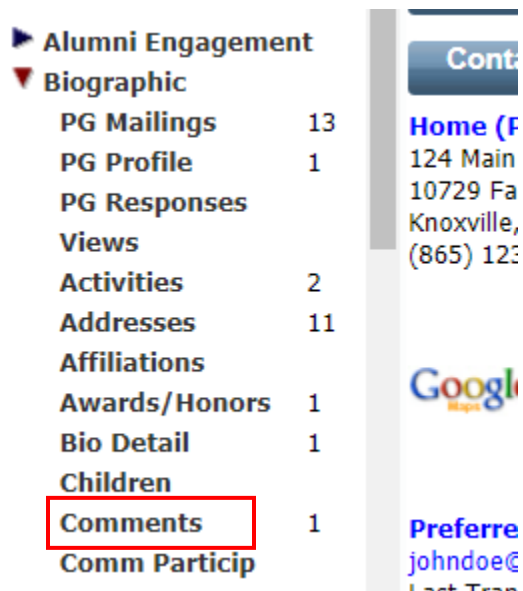
If an employee or volunteer has an active confidentiality form on file, there will be an indicator on the individual’s ANDI record.

1. Go to the individual’s ANDI record.
  
2. On the entity overview, a “Confidentiality Form on File” indicator will appear under the “Update the Record” link if the individual has an active form on file.

The screenshot shows the 'Entity Overview' for Mr. John Doe #94926. The page includes the following information:

- Entity Overview** (Header)
- Mr. John Doe #94926** (Name and ID)
- Do not solicit or contact** (Status)
- Rec Type**: Friend
- Degree**
- Married**: Ms. Jane Doe #2843558
- Update this record** (Link)
- Add research request** (Link)
- Add/remove assignment request** (Link)
- Open research profile** (Link)
- Confidentiality Form on File** (Indicator, highlighted with a red box)
- VIP** (Indicator)
- Special Handling** (Indicator)
- Do Not Text** (Indicator)

- To find details about when the form was filled out or who requested it, open the “Biographic” menu from the left-side of the entity overview and select the “Comments” section.



- On this screen you will find the date that the confidentiality form was approved, the staff member that submitted the form (listed in the Description field), and the Advancement Services staff member that approved the form and activated the indicator (listed by Author ID).
- Confidentiality forms for employees and volunteers expire after one year.