

Writing: Business Blog

Confidentiality in shared office space is possible. Here is what to look for.

SHARED OFFICE SPACE IS CHANGING the way independent lawyers, therapists and other professionals are approaching their real estate needs. But following professional ethics rules and considering clients' concerns with confidentiality can become complicated when using shared space – unless it's approached with caution.

Specifically, what items should you consider?

Will you have your own enclosed space? Cubicles, open table-tops and other large-area workspaces will not allow you to maintain confidentiality while working with clients or confidential documents. Instead, you must only lease space that includes enclosed offices for each individual lessee. Your workspace should be relatively sound-proof, so that no one outside of your office (in the hallway, waiting room, nearby offices, conference rooms or reception desk) can overhear conversations within your office.

If you have an assistant who will be using an open administrative station, make sure he or she has access to a file cabinet that can be locked and that client files are never left where they may be seen by others.

Are conference rooms and other meeting spaces enclosed? Can passers-by hear conversations from outside the door or see through a glass door?

Obviously, having a meeting with a family or group of clients will require the ability to meet somewhere other than your own office. Additionally, large gatherings of people in contentious settings can mean that anger and strong emotions are expressed with louder-than-normal voices. Ensure that the working space is conducive to these meetings.

Will your files – both tangible and electronic – be accessible to anyone other than you?

Be sure you have access to locked file cabinets or storage areas, where you can safely store confidential case files away from unintended readers. In addition, make sure that everyone who has necessary access to your files understands the importance of returning them immediately to locked areas when they are not in use.

Ideally, your computer should not be networked with any others within the building. If it must be, ensure password-protection is required to access all files, and store all files behind a single, protected folder with your name, not your clients' names. Ask your landlord who provides networking services, and talk with the company about the security practices they use.

Will you have your own printer and fax machine?

When you print confidential documents, where are they sent? If they are sent to a common-area printer, take measures to ensure they are properly secured. Some printers will require you to enter a code at the machine before they will print, ensuring that you are the only one who can retrieve the files. If that is not an option, ensure that an office administrator is properly trained on the importance of confidentiality and is instructed to return documents to you immediately, rather than leaving them in an open-area mailbox.

How will your mail be handled?

Because mail can contain names and other confidential information, ask your landlord if mail will be delivered directly to your office or deposited into a locked mailbox that only you can access. If

locked mailboxes are not available, ask that your mail be placed in a locked or controlled file cabinet until it can be hand-delivered to you.

Where will your clients wait if you are not available immediately upon their arrival?

Will they be sitting in a busy waiting room, or could they wait in a smaller waiting room that is less likely to present an uncomfortable situation for your client? For example, are there multiple, smaller waiting areas shared by only a few tenants each?

How will the receptionist answer the phone?

Will he or she forward all calls directly to your voice mail, avoiding the need to take names, write notes about a problem or present other opportunities for breaches of confidences? Have receptionists been trained on the importance of confidentiality within your profession? If you're an attorney, is a paralegal or legal secretary available to assist you and your clients?

What else can you do?

Ultimately, the responsibility for ensuring client confidences rests on the lawyer, therapist or other professional who is providing a service that necessitates it. In addition to ensuring the office environment is set up appropriately, you can also:

- Position your computer screen away from the door, so that anyone passing by your office will not see confidential information on your monitor.
- Don't listen to voice mails or take calls with your phone set on speaker mode.
- Use a white-noise machine, tabletop waterfall, fan, soft music or other noise interference to reduce the

Shared Office Space CONFIDENTIALITY CHECKLIST

Enclosed, private work space

Enclosed, sound-proof meeting spaces

Secure file storage – for both tangible and electronic files

Private printer and fax machine

Private, secure mail retrieval (avoid open-shelving/mail-slot units)

Semi-private waiting room for clients

Receptionists and other shared staff who understand the critical nature of confidentiality

 **amata**
Smarter Office Solutions
amataoffices.com

 **CorComm Creative**

WRITING
Blog Article

DESIGN
Pinterest/Social Graphic

CLIENT
Amata Offices

opportunity for sound to permeate your meeting space – especially if it's possible to hear conversations outside your door.

While it's nearly impossible to completely eliminate the possibility that confidences will be disrupted when sharing a space, even if only sharing with other lawyers or therapists, there are several ways you can significantly reduce the likelihood. Take these precautions, and remember to regularly check and improve your system to ensure confidentiality for your clients.

In addition to your own peace of mind, it will go a long way toward allowing your clients to relax, knowing their personal challenges will not be shared beyond your office door.