



## **OMBUDS VISIT AGREEMENT**

### **THE VISIT**

An Ombuds Visit is a private conversation with a skilled, neutral ombuds in which the visitor can think out loud about a workplace situation, gain clarity and perspective, and receive information about resources and possible constructive approaches. Afterwards, the next steps are entirely up to the visitor.

### **CONFIDENTIALITY OF THE VISIT**

Ombuds Services is a confidential resource where employees can talk openly about addressing workplace concerns constructively. Ombuds Services shall not disclose the identity of a visitor or the substance of confidential or personally identifiable communications — whether written, spoken, or otherwise — unless the office:

1. agrees to a visitor's request to make a specific disclosure; or
2. determines there is an imminent risk of serious harm to the visitor or others; or
3. is compelled or required by law to make a disclosure.

UNM supports the confidentiality of Ombuds Services and encourages people to make use of Ombuds Services to develop options for addressing their concerns or reaching their goals.

Ombuds Services may create or maintain data, not attributable to specific visitors, for use in trend reporting and other similar purposes. For examples of Ombuds Services trend reporting, please see the Annual Reports posted at [ombudsforstaff.unm.edu](http://ombudsforstaff.unm.edu).

Please be aware that Zoom/phone providers create a log of the call on both the visitor's and ombuds' computers/phones, in the UNM IT system (Zoom), and on the Zoom/phone servers. Other exceptions to absolute confidentiality beyond our control may also exist when using Zoom/ phone.

### **LIMITATIONS OF OMBUDS SERVICES**

Ombuds Services is an independent office with staff who listen to visitors and provide visitors with information about available resources and assistance in collaborative problem solving. Ombuds Services is an informal resource, and it does not conduct formal investigations. The office does not adjudicate disputes, issue findings, impose remedies or sanctions, or make decisions on behalf of the University, its employees, administrators, or the Board of Regents. Disclosures to Ombuds Services staff of alleged violations of law or policy are not considered notice to the University, nor can the office accept formal complaints on behalf of the University.

Visitors are encouraged to discuss any concern with an ombuds who can provide referral information and policy guidance to help the visitor to notify the University of alleged violations.

Ombuds Services does not provide legal advice and is not a substitute for anyone's lawyer, representative, or counselor. The visitor is solely responsible for deciding what actions to take following the visit.

### **AGREEMENT**

By initialing below and returning this agreement, I acknowledge that I have read and understand this Ombuds Visit Agreement. I accept the limits to Zoom and phone confidentiality when Ombuds Services hosts a Zoom/Phone visit with me. I agree that nobody will record the Zoom/Phone visit. I will not involve Ombuds Services staff in any formal process.

Initials of Visitor

**Please return the initialed agreement to Ombuds Services prior to your visit. We look forward to your visit. Thank you!**