

# VOLUNTEER HANDBOOK

Policies and procedures for  
SourcePoint volunteers.



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## Welcome from Fara Waugh

Dear Volunteer,

Congratulations! You've taken the first step! You have joined a special group of generous, caring individuals, dedicated to our mission to keep seniors in their homes as long as possible. Our volunteers are vital to the success of our organization and we rely on their generosity of time and spirit to make our organization stronger and better able to serve the older and most frail members of our community. Whether this is your first volunteer opportunity or you have been serving our community in other capacities, we are certain that your experience will be truly rewarding.

We offer a variety of volunteer opportunities and are certain that you will find at least one that interests you. Your positive attitude, desire to help others, and previous life experiences are invaluable tools as you make a difference in our community. As one of our volunteers recently said, "I never thought that I would get more than I gave as a volunteer."

This handbook will help you learn how you can best serve as a volunteer and will assist you in utilizing your talents and energy to support our efforts in making Delaware County a better place to grow older. Your assistance will complement and extend services and help us ensure our mission of care is both efficiently and effectively provided.

We extend our heartfelt thanks to all our volunteers who help us keep older adults living safely and independently in their own homes. We are certain you will find your experience to be interesting, as well as enjoyable, and that you will want to encourage others to join our team, too. Your ideas, comments, and suggestions are always welcome.

Best Wishes,

Fara Waugh  
Executive Director



*Set your own course to thrive after 55*



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## Introduction

SourcePoint is a primary source of professional expertise, services, and programs for Delaware County adults who want to thrive after 55. Founded in 1991, when an increase in community-based care was necessary for the growing number of seniors, programs were developed to meet those needs. Today we offer in-home care services, nutrition services, assistance with insurance questions, and resources and support for family caregivers. We also provide fun, learning and fitness for seniors in our Enrichment Center.

One of the key strengths of SourcePoint has been the many contributions of dedicated volunteers who provide SourcePoint with credibility, insight, perspective, diversity, and expertise that helps fulfill SourcePoint's mission. We are so grateful for all our volunteers do.

A volunteer at SourcePoint is anyone who, without compensation or expectation of compensation beyond optional mileage reimbursement, performs a task at the direction of, and on behalf of, SourcePoint. Volunteers are not employees of SourcePoint, but they enhance the work of our staff members and allow staff to focus on tasks and projects that will increase greater service offerings to our senior community in Delaware County.

### **What volunteers can expect from SourcePoint**

SourcePoint values its volunteers and endeavors to provide volunteers with the following:

- A. A written position description so volunteers understand their roles and the tasks they are authorized to perform.
- B. A full orientation and any additional training necessary for the volunteer role.
- C. A safe environment in which to perform the assigned role.
- D. Respect for privacy, including keeping our volunteers' personal information confidential.
- E. The ability to ask questions of, and get feedback from, an assigned Volunteer Supervisor.
- F. Optional reimbursement for mileage expense when driving a personal vehicle on behalf of SourcePoint.

### **What SourcePoint expects of its volunteers**

We ask that volunteers:

- A. Support SourcePoint's mission.
- B. Participate in all relevant orientation and training programs.
- C. Perform authorized duties under the supervision of the assigned Volunteer Supervisor.
- D. Understand and comply with SourcePoint's policies and procedures.
- E. Notify their Volunteer Supervisor of any potentially hazardous situations, accidents or incidents.



- F. Interact appropriately with all staff, clients, members and the public while volunteering.
- G. Safely use any SourcePoint property or equipment for the purpose of the assigned role, including the acceptable use of technology.
- H. Keep the lines of communication open regarding volunteer satisfaction.

### **Purpose of this manual**

This policy manual was written to provide overall guidance and direction to individuals engaged in volunteering at SourcePoint, to demonstrate SourcePoint’s commitment to its volunteer program and its individual volunteers, and to ensure that all volunteers are treated equally and fairly.

## **Equal Volunteer Opportunity**

### **POLICY**

The volunteer program is open to all persons regardless of race, color, religion, gender, sexual orientation and/or identity, national origin, age or physical abilities who:

- A. Meet the basic requirements for a specific volunteer position, such as minimum age, physical abilities, knowledge, and experience.
- B. Have completed the required orientation process and requisite training as prescribed in the volunteer assignment job descriptions.
- C. Are accompanied by a family member or legal guardian while volunteering if they are under the age of fourteen (14). Youth between the ages of 14-17 may volunteer without parental supervision but must be accompanied by another adult volunteer or staff member. Refer to the Youth Policy in the next section.

It is the policy of SourcePoint to admit, serve, and provide programs to all clients without regard to race, color, religion, gender, sexual orientation and/or identity, national origin, age or physical abilities. The same requirements for participation are applied to all. There is no distinction in eligibility for, or in the manner of providing, any service provided by SourcePoint or by others. All persons and organizations having occasion either to refer potential clients or to recommend SourcePoint, are advised to do so in keeping with this policy.

### **PROCEDURE**

SourcePoint will in no way tolerate any form of discrimination of or by its volunteers. Any volunteer who feels he or she has been discriminated against should immediately report the incident to their Volunteer Supervisor who will inform the Human Resources Manager. If the complaint is against the Volunteer Supervisor, the volunteer may inform the Human Resources Manager directly by calling SourcePoint at 740-363-6677 and asking for the Human Resources Manager.



## Youth Volunteers

### **POLICY**

Per the Equal Volunteer Opportunity policy above, young people under the age of 14 may volunteer if they are accompanied by a family member or legal guardian while volunteering. Youth between the ages of 14-17 may volunteer without parental supervision but must be accompanied by another adult volunteer or staff member.

Volunteers under 18 years of age must have the written consent of a parent or legal guardian to volunteer at SourcePoint. The consent form can be found on the MySourcePoint.org website. Individuals under age 14 may volunteer with a parent or guardian as part of a family or group project such as food drives, service events and certain service projects. Responsibilities assigned to minors are performable in a non-hazardous environment and in compliance with the requirements of child labor laws.

The following list is a sample of the types of volunteer service young people can perform at SourcePoint.

- A. Office Assistant
- B. Event Assistant
- C. Craft projects
- D. Dining Room Assistant
- E. Ensure Assistant
- F. Food Packing and Labeling
- G. Pet Food Packing and Labeling
- H. Entertainment
- I. Activity Assistant
- J. Meals on Wheels Assistant

### **PROCEDURE**

- A. Complete and submit the Youth Application online.
- B. Access and print the Parental Consent Form and bring the signed form to SourcePoint.



## Service Event Volunteers

### POLICY

Service Events are periodic, organized service days that are open to non-documented SourcePoint volunteers to serve on a limited, as-needed basis, or to fulfill service requirements. These events offer occasional opportunities for individuals and groups of two or more to provide service, which benefit Delaware County seniors. Service event volunteers are not screened and may not work directly with clients or money.

Examples of service events with the potential for group or individual participation are:

- A. Fundraising Events
- A. Volunteer Appreciation Events
- B. Grandparents' Day
- C. Specialized service event opportunities customized at the request of a specific service group

Individuals or groups may volunteer in partnership with a:

- A. Business / corporation
- B. Religious organization
- C. Service club
- D. Family unit

Service group volunteers are not active volunteers, but hold the status of 'Service Day Only'. They are not screened, and may not work in a client home or with money. Service groups may serve at SourcePoint approved sites.

### PROCEDURE

All members of service groups must adhere to the following guidelines:

- A. The service group must have a Group Leader who is responsible for the safety and well-being of the group members, will provide coordination and supervision for the group while volunteering, and ensure all members conform to SourcePoint's Volunteer Policies and Procedures.
- B. The Group Leader will complete the online Service Group Application.
- C. Youth volunteer groups must have an adult Group Leader.
- D. Individual youth volunteers should refer to the Youth Policy.



## VolunTIER Assignment System

### POLICY

The following tier system is used to track volunteer compliance and fulfillment of required training, documentation and other items associated with each assignment.

### PROCEDURE

Volunteers should be aware of the requirements tied to their preferred assignment(s) and comply with the Volunteer Supervisor's training and request for documentation and other items to be completed.

#### **Tier 1 Volunteer Assignments**

Requirements:

- Orientation
- Initial background check
- Driver's license number recorded
- Annual proof of auto insurance
- Initial check of official BMV
- Annual check of unofficial BMV
- Secondary training per department standards

*Assignments: Medical Transportation*

#### **Tier 2 Volunteer Assignments**

Requirements:

- Orientation
- Initial background check
- Driver's license number recorded
- Proof of auto insurance every two years
- Initial check of unofficial BMV
- Check of unofficial BMV every two years
- Secondary training per department standards

*Assignments: Meals on Wheels, Ensure Deliveries*

#### **Tier 3 Volunteer Assignments**

Requirements:

- Orientation
- Initial background check
- Secondary training per department standards

*Assignments: Home Chores, Caregiver Relief, OSHIIP, Fitness/Aquatics, Office Assistant, Café 55, Intern, Gift Shop, Concierge, St. Michael's MOW route, MOW Assistant, Ensure Deliveries Assistant & Medical Transportation Assistant.*





### **Tier 3a Volunteer Assignments**

- CPR/FA/AED Class Attendance (*Fitness/Aquatics*)

### **Tier 3b Volunteer Assignments**

- Information Technology Policy & Procedures Sign Off (*OSHIIP, Office Assistant & Intern*)

### **Tier 4 Volunteer Assignments**

Requirements:

- Orientation
- Secondary training per department standards

*Assignments: All remaining EC and CE assignments, Distribution, Outreach, Social Media, Mailings, Farmers Market, Group Leader, Kitchen Assistant, Catering Assistant*

### **Tier 5 Volunteer Assignments**

Requirements:

- Group or Youth application

*Assignments: Special Events, Pet Food, Volunteer Group Activities, Group Home Chores*

## **Criminal Record Checks**

### **POLICY**

SourcePoint is committed to providing a safe environment for staff, volunteers, clients, members and visitors, as well as maintaining compliance with all Federal, State, Local and Funder volunteer rules. The purpose of this policy is to educate volunteers about the preventive step SourcePoint takes to ensure the safety of our staff, volunteers, clients, members and visitors is not at risk.

### **DEFINITIONS**

**OAC** – Ohio Administrative Code

**BCII** – Bureau of Criminal Identification & Investigation

**Roster** – A list of volunteer applicants and active volunteers that includes the following: name, start date of first client contact, date criminal records check was submitted to BCII, types of record checks submitted, date report was received, determination of report, results and whether there was a disqualifying offense.

### **PROCEDURE**

All potential applicants will be advised of the following procedures, at the time of application.

- A. As part of the orientation program, volunteers ages 18 and over, whose preferred assignments meet the following criteria, must submit to a criminal background check via fingerprinting.



1. Assignment involves client contact.
  2. Assignment involves one-on-one interactions with members or the public.
  3. Responsibilities include handling cash.
  4. Responsibilities include having access to consumer records.
- B. If the applicant has not resided in Ohio continuously during the five (5) years immediately prior to volunteer application, the background check must include an FBI check.
- C. Exceptions include Special Event volunteers and Service Day volunteers who do not have client contact or money-based assignments. SourcePoint may choose to conditionally place such volunteers in a non-client- or non-money-based assignment prior to receiving the BCII/FBI results, as long as fingerprints have been obtained. If SourcePoint has not received the results within 60 days of submitting the request to BCII, SourcePoint must terminate the volunteer's assignment. This requirement must be explained to all applicants during the Volunteer Orientation.
- D. All volunteers who are involved with home visits or unsupervised contact with clients will be restricted from those tasks until the BCI report is received.
- E. Active volunteers are not required to undergo additional background checks.
- F. To be reactivated as a volunteer after 18 months or more of inactivity, the volunteer must attend the Volunteer Orientation again and, if required per section A, resubmit to a criminal background check via fingerprinting.
- G. All background check reports will become part of the volunteer's file.

## **Dress Code**

### **POLICY**

For all intents and purposes, the dress code at SourcePoint is casual.

- A. Appropriate dress is expected while representing SourcePoint whether on-site or off-site.
- B. Requirements include, but are not limited to:
1. Clothing that promotes alcohol, smoking and/or drugs, or clothing that displays any political statements or offensive language is prohibited.
  2. The length of skirts or shorts must provide appropriate coverage.
  3. Transparent apparel is not allowed.
  4. Volunteers are encouraged to wear their SourcePoint shirt.
  5. Volunteers are required to wear their ID badges while volunteering.
  6. Additional dress codes may be required per department.



## PROCEDURE

- A. Management reserves the right to make judgments about whether the dress of individual volunteers meets these standards.
- B. If it is determined that dress does not meet these standards of appropriateness, management will inform the volunteer and may choose to ask the volunteer to change their clothing before serving or take other appropriate actions.

## Use of Personal Vehicles

### VOLUNTEER POLICY

This volunteer policy applies to all volunteers who drive their personal vehicles to transport clients or drive a delivery route (Medical Transportation, Ensure Deliveries and Meals On Wheels assignments).

#### Requirements for Volunteers who drive:

- A. Must be at least eighteen (18) years old.
- B. Must submit a **driver's license** to the Volunteer Recruiter at the time of fingerprinting or to their Volunteer Supervisor before they may begin their driving assignment. The license number will be placed in the volunteer's file and be accessible only to database administrators.
- C. Must provide proof of **vehicle insurance** to their Volunteer Supervisor before they may begin their driving assignment. Thereafter, Medical Transportation volunteers will annually demonstrate proof of insurance. Meals On Wheels volunteers will demonstrate proof of insurance every two years.

#### **Required Insurance Coverage**

Liability coverage -- \$100,000 per person; \$300,000 per accident

Property damage -- \$100,000; \$300,000 combined single limit.

- D. Medical Transportation drivers, because they transport clients, must give permission for an initial three-year report of their driving history from the Bureau of Motor Vehicles (BMV) and annually thereafter submit to a two-year BMV check that will be initiated by SourcePoint.
- E. Meals On Wheels and Ensure Delivery volunteers must give SourcePoint permission to request a two-year report of their driving history from the Bureau of Motor Vehicles (BMV) and thereafter every two years submit to a BMV check that will be initiated by SourcePoint.



## **Driving Record**

- A. In the case of an accident, the volunteer's insurance is the primary insurance and SourcePoint's insurance is secondary.
- B. SourcePoint shall not be responsible for, or reimburse volunteers for, traffic violations, fines, or parking violations received while conducting SourcePoint business in their personal vehicle.
- C. Volunteers are expected to operate their personal cars in a lawful and safe manner at all times while on SourcePoint business.
- D. A driver with the following citations on his or her driving record is ineligible for SourcePoint driving assignments:
  - a. 3 speeding tickets within a 3-year period
  - b. 2 at-fault accidents within a 3-year period
  - c. A major moving violation within a 5-year period (DUI or Reckless Operation)
- E. For speeding citations, a volunteer may complete a remedial or defensive driving course at his or her own expense. A certificate of completion of the driving course must be provided to the Volunteer Recruiter prior to the volunteer resuming driving privileges. Failure to take and pass a remedial or defensive driving course will result in a reassignment of volunteer duties (as agreed to by the volunteer) that do not include driving on behalf of SourcePoint.
- F. A driver convicted of reckless operation or driving under the influence of alcohol or drugs, both of which are unlawful actions, while driving on or off SourcePoint business will no longer be qualified to drive on behalf of SourcePoint and will be reassigned to other volunteer duties (as agreed to by the volunteer) that do not include driving on behalf of SourcePoint.

## **Mileage Reimbursement**

- A. Drivers of personal vehicles can choose to be reimbursed for the miles they drive while doing SourcePoint business. Options for reimbursement are 100% and 50% of miles driven, or the volunteer can choose to donate their mileage to SourcePoint.
- B. Volunteers that first report to SourcePoint before beginning their assignments, such as Meals On Wheels drivers, begin tracking time and mileage when they leave SourcePoint and end tracking time and mileage upon their return to SourcePoint.
- C. SourcePoint reimburses mileage via electronic auto-deposit on a monthly basis. Volunteers are strongly encouraged to supply banking information to accommodate this procedure.
- D. Volunteers who are reluctant to provide bank information will be mailed a quarterly mileage reimbursement check.

## **PROCEDURE**

These procedures refer to any such volunteers who drive their personal vehicles as defined in the policy above.



- A. Volunteers are required to report any suspension or revocation of the volunteer's driver's license and any conviction of a major moving violation.
- B. A volunteer who does not report the above immediately will no longer be qualified to drive on behalf of SourcePoint and will be reassigned to other volunteer duties (as agreed to by the volunteer) that do not include driving on behalf of SourcePoint.

The following procedure refers to volunteers who drive SourcePoint vehicles on SourcePoint business.

The Human Resource Manager shall annually submit to the Bureau of Motor Vehicles (BMV) the names, license numbers, and proof of insurance for all volunteers who drive SourcePoint vehicles on SourcePoint business.

## **Time and Mileage**

### **POLICY**

All volunteers are required to record all hours and mileage served for SourcePoint, including all times the volunteer started their assignment and stopped their assignment. The Volunteer Information Center (VIC) located in the SourcePoint foyer includes a time-tracking module called VicTouch in which a volunteer's service hours can be recorded. VicNet is SourcePoint's online portal for volunteers who track off-site time and mileage. Other forms of providing hours are paper time sheets and other types of records that may be used by SourcePoint to document the hours worked by volunteers so hours and mileage can be determined. Refer to the examples of timesheet and mileage reports in the Appendix.

Failure to adhere to the mileage-reporting procedures may result in the loss of reimbursement for the mileage in question. Inflation of mileage will result in reassignment (as agreed to by the volunteer) to a non-driving assignment.

### **PROCEDURE**

- A. Timesheets (paper or electronic) shall indicate all actual hours volunteered and miles traveled (if applicable).
- B. All timesheets including miles traveled (if applicable) must be turned in to the Volunteer Supervisor for review and approval by the end of each month or the first week of the following month.
- C. The volunteer must ensure the client signs the timesheet when required.
- D. All volunteers are expected to report their time and mileage accurately, without misrepresenting or altering any records.
- E. Failure to adhere to the time-tracking procedures may result in the loss of hours-based awards.



- F. Failure to adhere to the mileage reporting procedures may result in the loss of mileage reimbursement.
- G. Volunteers in compulsory community-service programs or internships who misrepresent hours served will be subject to dismissal from the program.
- H. Volunteers may refer to sample timesheets in the Appendix or see their Volunteer Supervisor for a department timesheet.

## **Confidentiality**

### **POLICY**

SourcePoint volunteers will protect the client's Right to Privacy by holding in confidence all information obtained in the course of providing information, assistance and service unless a court order requires otherwise.

- A. The purpose of this policy is to:
  - 1. Protect the client's Right to Privacy.
  - 2. Ensure the protection of confidentiality of information about persons referred to and enrolled in any program of SourcePoint.
  - 3. Educate staff, clients, caregivers, volunteers, and significant others regarding confidentiality, the release of information, and the limits of confidentiality.
  - 4. Ensure compliance with client privacy rights as required by and specified in the privacy rule of the Administrative Simplification Provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Refer to the HIPAA Policy in the Appendix.
- B. Clients served by SourcePoint have the following rights with respect to the privacy of their health information:
  - 1. To receive a paper copy of SourcePoint's Notice of Privacy Practices.
  - 2. To lodge complaints about SourcePoint's privacy practices.
  - 3. To request restrictions on the uses and disclosures of health information.
  - 4. To request to receive confidential communication.
  - 5. To access their protected health information for inspection and/or copying.
  - 6. To amend their health care information.
  - 7. To request an accounting of disclosures of health information.
- C. Information related to patient privacy rights is included in the orientation program for new volunteers.



## PROCEDURE

- A. SourcePoint will protect the client's Right to Privacy and maintain client confidentiality by:
  1. Obtaining written permission/informed consent from the client or legal representative for disclosure of information to other professionals and agencies outside the SourcePoint network.
  2. Exercising discretion in releasing only the information about the client that is relevant to a problem at hand.
  3. Informing the client fully about the limits of confidentiality in a given situation, the purpose for which information is obtained, and how it may be used.
  4. Asking the client what they would like shared with significant others.
  5. Educating the volunteer on the client's right to privacy, the release of information, and the limits of confidentiality.
  6. Obtaining informed consent from clients before taping, recording, or permitting a third-party observation of their activities (e.g., allowing a non-volunteer to ride along on a medical transport).
  7. Obtaining the volunteer's agreement that they will not share client information that would identify the client to other volunteers or non-volunteers.
  8. Having volunteers sign confidentiality agreements.
- B. The volunteer will not disclose client information to anyone without a signed release including, but not limited to, law enforcement, family members, neighbors, friends, or other service providers.
- C. Any request for information made by an individual, group, or organization about an alleged or actual client, shall be advised that we are unable to divulge any information either confirming or denying that an individual is a client, without written consent by the client.
- D. All media representatives are to be referred to the Director of Communications and Development and a "No Comment," response is to be given, regardless of whether the individual is a client or not.

## Ethics

### POLICY

- A. SourcePoint expects and requires of all volunteers and board members the highest standard of ethical behavior in all dealings with one another, with clients, and with members and visitors.
- B. When the nature of an ethical dilemma makes the proper course of action unclear, volunteers and board members are advised to seek advice from the management to whom they report to discuss matters that require clarification. In general, volunteers and board members are advised to err on the side of caution in handling ethical dilemmas.



## PROCEDURE

### Receiving Gifts

- A. Volunteers must adhere to the following guidelines regarding gifts.
1. Accepting gifts that could be construed to improperly influence your work on behalf of SourcePoint is prohibited.
  2. It is useful to remember that appearances as well as reality are important considerations. The guiding principle in this area is to use good judgment.
  3. In general, gifts should not be accepted; however, in the event a gift is offered, the following examples can be used as a basis for deciding on the appropriateness of a gift.

#### Acceptable Gifts

- Baked goods
- Hand-crafted gifts
- Small mementos/trinkets
- Thank-you cards

#### Unacceptable Gifts

- Meals
- Cash
- Gift cards
- Reimbursement for gas
- Entertainment tickets
- Real estate
- Securities
- Solicited gifts

- B. When a volunteer cannot refuse to accept a gift of more than nominal value tactfully or without harming a relationship, the volunteer must promptly turn the gift over to their Volunteer Supervisor.

### Giving Gifts

- A. As a general rule, volunteers should not give gifts.
- B. Upon learning of a client's needs, a volunteer should not gift the client with money, home furnishings, meals, etc., without prior approval from the SourcePoint Client Services Manager.
- C. Conflicts of Interests:
1. SourcePoint and its work exist within an internal and external "community of interest" related to the delivery of effective social and health services for older adults. Particularly in a small community the potential for conflicts of interest or the appearance of conflicts of interest is significant. These conflicts of interest should be avoided and the appearance of conflicts of interest should be dealt with through open disclosure.
  2. Examples of potential conflicts of interest to be avoided include, but are not limited to, the following:
    - Representing SourcePoint in dealings in which the individual has an interest.





- Soliciting personal favors from companies, grantees, or providers with whom SourcePoint does business.
  - Selling one's services to companies with whom SourcePoint does business.
  - Influencing an employment decision involving a relative or friend.
  - Seeking to influence a grant or contract with an organization with which one has a personal relationship.
  - Promoting a business belonging to a volunteer, a volunteer's relative or a volunteer's friend.
- D. Due to the interconnectedness of SourcePoint and its many partners, if a volunteer suspects that a technical conflict or the appearance of a conflict may exist, it is important that the matter be disclosed to the Volunteer Supervisor or, in the case of board members, to the Board of Directors, and that the volunteer abstain from the formal decision-making process involving the potential conflict.

## **Volunteer and Ethical Behaviors Agreement**

### **POLICY**

Every volunteer that fills a Tier 1 – Tier 4 volunteer assignment must read and agree to the following agreement regarding ethical behaviors.

#### **If accepted into the volunteer program I agree to:**

1. Hold as confidential all information that I may obtain directly or indirectly concerning clients and staff and not seek to obtain unnecessary confidential information from a client.
2. Become familiar with the organization's policies and procedures and uphold its philosophy and standards.
3. Donate my services to the organization without the expectation of compensation or future employment.
4. Be punctual and conscientious; conduct myself with dignity, courtesy and consideration of others; and endeavor to make my work professional in quality.
5. Maintain a well-groomed appearance during my volunteer time.
6. Attend orientation and in-service training as scheduled.
7. Seek the assistance of my Volunteer Supervisor as needed or necessary.
8. Take any problems, criticism or suggestions to my supervisor or the Recruiter for Volunteer Services.
9. Complete volunteer hours as assigned.
10. Adhere to the volunteer policies if unable to work as scheduled.
11. Honor my commitment toward volunteer service.



**As a Volunteer I will not engage in the following activities:**

1. Using the client's car.
2. Consuming the client's food and drink.
3. Using the client's personal property without their consent.
4. Eating food brought to the client's house without the client's consent.
5. Using the client's telephone for personal calls.
6. Discussing the client's personal problems or religious/political beliefs.
7. Accepting gifts or tips from clients.
8. Borrowing money from or loaning money to the client.
9. Accepting or attempting to obtain money or anything of value, including gifts or tips from the client, household members and/or family members of the client.
10. Giving the client medical advice.
11. Consuming alcohol, medicine, drugs or other chemical substances not in accordance with the legal, valid, prescribed use and/or in any way that impairs me in the delivery of services to the client and/or when representing SourcePoint.
12. Engaging with the client in sexual conduct or in conduct that may reasonably be interpreted as sexual in nature, regardless of whether or not the contact is consensual.
13. Engaging in behavior that causes or may cause physical, verbal, mental or emotional distress or abuse to the client.
14. Engaging in behavior that may reasonably be interpreted as inappropriate involvement in the client's personal relationship.
15. Being designated to make decisions for the client in any capacity involving a declaration for mental health treatment, power of attorney, durable power of attorney, the client's finances or guardianship.
16. Selling or purchasing any products or personal items from the client.
17. Engaging in behavior that constitutes a conflict of interest or takes advantage of or manipulates SourcePoint approved service resulting in an intended advantage for personal gain that have detrimental results for the client, the client's family or caregiver.
18. Bringing children, pets, friends, relatives, or anyone else to the client's place of residence without prior authorization from my Volunteer Supervisor.
19. Smoking in the client's home with or without the client's permission.
20. Giving the client my home or mobile telephone number (all clients should be directed to SourcePoint).
21. Breaching the client's privacy or confidentiality of client records as outlined in HIPAA Training.



I understand that SourcePoint reserves the right to terminate my volunteer status as a result of failure to comply with organizational policies, rules and regulations; breach of confidentiality, absences without prior notification; unsatisfactory attitude, work, or appearance; or any other circumstance which, in the judgment of my supervisor or the Recruiter for Volunteer Services, would make my continued service as a volunteer contrary to the best interests of the organization. I understand that intentional or involuntary violation of confidentiality may result in disciplinary action, including termination, by SourcePoint and/or possible legal action by others (i.e. clients, families of clients, etc.)

## **PROCEDURE**

A separate signature page will be provided at the Volunteer Orientation for the volunteer's signature.

## **Volunteer Conduct**

### **POLICY**

SourcePoint strongly promotes an environment where conflict is resolved with mutually satisfying outcomes. Every effort should be made to resolve issues as soon as they arise. Every effort must be made to find an equitable solution and subsequent steps should only be taken when the previous steps fail.

- A. Volunteers are expected to follow rules of conduct that will protect the interest and safety of all staff, volunteers, clients, members and visitors.
- B. Volunteers shall be courteous, considerate, respectful, and prompt in working with staff members and in dealing with and serving clients, members and visitors.
- C. Volunteers shall maintain high standards of honesty, integrity, impartiality and discretion.
- D. Volunteers shall place the interests of staff, clients, members and visitors ahead of their personal interests.
- E. Volunteers shall not use, or attempt to use, their role at SourcePoint for personal gain or use confidential information for personal advantage.
- F. Volunteers whose roles require the use of technology resources, or who are given access for personal use, will adhere to SourcePoint's policies and procedures for information technology.

### **PROCEDURE**

While the involvement of volunteers is generally a positive experience for everyone involved, SourcePoint has a process when negative situations arise or a complaint is made against a volunteer.

The following procedure shall be followed to ensure a fair, equitable, and consistent approach in dealing with volunteer conduct issues.



#### A. Overriding guidelines

1. All complaints will be treated confidentially, and will only be discussed with those who are directly involved in trying to resolve the issue.
2. A written record of all incidents and complaints about a volunteer will be maintained in their volunteer file.
3. Sufficient time for all meetings must be allowed and meetings will be conducted in a private place.
4. Volunteers have the right to be accompanied by a colleague or friend in any meetings that form part of the problem-solving process.

#### B. Step One

The Volunteer Supervisor and the volunteer shall meet with the person making the complaint to discuss the conflict/issue.

The Volunteer Supervisor will manage the conflict:

1. Define the Problem — What is the issue?
2. Analyze the Problem — What are the causes?
3. Determine the Goal — What do you want?
4. Brainstorm Solutions — Brainstorm a number of options rather than debating 1 or 2 strategies.
5. Select the Best Solution — Agree upon the best solution for both parties.
6. Try It – Ensure it is a workable solution.
7. Evaluate the solution — Periodically revisit the solution to see if it is appropriate.

#### C. Step Two

If the issue cannot be resolved in this initial meeting, the Volunteer Supervisor will recommend a follow-up meeting with the Volunteer Supervisor and Department Manager or other appropriate SourcePoint staff member. The Volunteer Supervisor will be responsible to arrange the meeting. Every effort will be made to resolve the issue in this meeting with a solution that is acceptable to all parties.

#### D. Step Three

If there is no resolution during this second meeting, the Volunteer Supervisor will recommend a different volunteer assignment for the volunteer.

Volunteers who do not adhere to SourcePoint policies and procedures or who fail to satisfactorily perform their volunteer assignment are subject to release from their assignment or reassignment to another position. Reassignment of a volunteer will occur when a volunteer is unable to continue in their current role, but is able to volunteer in another capacity. Release of a volunteer will be the last resort.



### **Conduct meriting immediate assignment termination**

- A. There are some conduct issues for which volunteers will be suspended immediately while an investigation is carried out. These include, but are not limited to, acts that constitute gross misconduct, e.g. theft, assault, an act of violence, malicious damage, deliberate falsification of documents, harassment, and being under the influence of drugs or alcohol.
- B. Illegal or criminal acts will be reported to the police and may result in prosecution.
- C. The Volunteer Recruiter and the Human Resources Manager must be informed immediately.

## **Children Accompanying Adult Volunteers**

### **POLICY**

There are instances when children accompany adults when the adult volunteer is serving on their volunteer assignment. The two most common reasons for children accompanying an adult volunteer are due to child care issues or the adult volunteer wants to expose the child to volunteering. This is more suitable to some assignments than to others.

- A. Assignments that are never conducive to accommodating children accompanying an adult volunteer are as follows:
  - Office assignments
  - Gift shop assistant
  - Concierge
  - Kitchen assistants
  - Fitness desk attendant
  - Aquatics desk attendant
- B. In all other areas, volunteers must secure the approval of their Volunteer Supervisor before bringing a child with them.

### **PROCEDURE**

- A. Even if a Volunteer Supervisor grants approval for a child to accompany an adult volunteer, the approval is contingent on the following conditions:
  - The adult provides continuous supervision
  - The child's behavior is not disruptive to staff, other volunteers, members or clients
  - The child's presence does not interfere with the volunteer's ability to complete their assignment
- B. In the event these conditions are not met, the Volunteer Supervisor can rescind their approval for the child to accompany the adult volunteer.



## **Drug and Alcohol**

### **POLICY**

The use of drugs and alcohol is strictly prohibited in all SourcePoint facilities, parking lots, and any other areas controlled by SourcePoint. They are also prohibited on or in clients' property or while transporting a client.

### **PROCEDURE**

Volunteers who do not adhere to SourcePoint policies and procedures are subject to release from their assignment.

## **Smoking and Vaping**

### **POLICY**

Smoking and vaping are prohibited in all SourcePoint facilities, parking lots, and any other areas controlled by SourcePoint. They are also prohibited on or in clients' property or while transporting a client.

### **PROCEDURE**

Volunteers who do not adhere to SourcePoint policies and procedures are subject to release from their assignment.

## **Incident Reporting**

### **POLICY**

All events that adversely affect the physical and/or emotional health of any client or volunteer of SourcePoint or involves any damage to, or theft of, their property shall be reported to their Volunteer Supervisor. Such events may or may not be the responsibility of the volunteer making the report, but the volunteer may be the person to whom the client reported the event.

### **PURPOSE**

- A. To enhance the safety and well-being of clients and volunteers.
- B. To enhance the quality of services via communication between volunteers and SourcePoint.
- C. To provide for the opportunity to resolve identified problems through altering the client service plan or volunteer position. This may include increasing or changing client services or referring clients for appropriate medical or mental health care or changing the volunteer position.
- D. To provide the procedures by which a client or volunteer may file a claim for injury, damage or theft of property.



## PROCEDURES

- A. If an incident is an emergency, the volunteer shall follow emergency protocol as established by SourcePoint (see Emergency Response Plan in this manual).
- B. Onsite incidents shall be reported to the Volunteer Supervisor within 24 hours of the event. Incidents that occur off-site should be called in within 24 hours of the event. Calls can be made to (740) 363-6677 during the hours of 8:00 am - 5:00 pm Monday through Friday.
- C. The SourcePoint Incident Report shall be completed and given to the Volunteer Supervisor or the Department Manager who will forward the report to the appropriate director. Refer to the Appendix for a sample of the Incident Report.
- D. Upon receiving the call or Incident Report, the appropriate SourcePoint representative shall gather all pertinent information to the event including, but not limited to, the nature of the event, the involved parties and any resolutions offered or planned.
- E. The SourcePoint representative will contact the client or volunteer about the report, clarify any questions regarding the event, and listen to any concerns the client or volunteer may have regarding the plan for resolution.
- F. In the event the incident involves any abuse, neglect, or exploitation of the client, SourcePoint is responsible to report the incident to Adult Protective Services or the appropriate Delaware law enforcement agency, as well as ensuring an Incident Report is submitted to the appropriate SourcePoint representative (refer to Reporting Abuse, Neglect or Exploitation Policy in this manual).
- G. All Incident Reports involving clients that are submitted by volunteers are confidential and shall be maintained in an Incident Report notebook. All incident reports involving volunteers are confidential and shall be maintained in the volunteer file.
- H. Any incident that constitutes filing a claim against SourcePoint's liability insurance policy shall be provided to the appropriate SourcePoint representative once the above procedures have been followed. The claim is filed with SourcePoint's insurance carrier using the Incident Report.

## Reporting Abuse, Neglect or Exploitation

It is the policy of SourcePoint to report any suspicion or observance of abuse, neglect or exploitation of any child, older adult or vulnerable individuals to law enforcement or the designated investigative agency, as required by law.

## PURPOSE

- A. To assist in the prevention or elimination of abuse, neglect or exploitation of vulnerable individuals.
- B. To fulfill ethical and legal responsibilities.
- C. To assist in the investigative process as necessary and permitted by law.
- D. To contribute to a collaborative and cooperative community response to the mistreatment of vulnerable individuals.



## DEFINITIONS

**Physical Abuse** is defined as the use of physical force that may result in bodily injury, physical pain, or impairment. Physical abuse may include but is not limited to such acts of violence as striking (with or without an object), hitting, beating, pushing, shoving, shaking, slapping, kicking, pinching, and burning. In addition, inappropriate use of drugs and physical restraints, force-feeding, and physical punishment of any kind are also examples of physical abuse.

**Sexual abuse** is defined as non-consensual sexual contact of any kind. Sexual contact with any person incapable of giving consent is also considered sexual abuse. It includes, but is not limited to, unwanted touching, all types of sexual assault or battery, such as rape, sodomy, coerced nudity, and sexually explicit photographing.

**Emotional or psychological abuse** is defined as the infliction of anguish, pain, or distress through verbal or non-verbal acts. Emotional/psychological abuse includes but is not limited to verbal attacks, insults, threats, rejection, intimidation, humiliation, harassment or belittling acts that cause or could cause distress.

**Neglect** is defined as the caretaker's refusal or failure to fulfill any part of his or her obligations or duties. Neglect may also include failure of a caretaker who has fiduciary responsibilities to provide care for the elderly (e.g., pay for necessary home care services) or the failure on the part of an in-home service provider to provide necessary care.

**Self-Neglect** is characterized as the behavior of an elderly person that threatens his/her own health or safety. Self-neglect generally manifests itself in an older person as refusal or failure to provide himself/herself with adequate food, water, clothing, shelter, personal hygiene, medication (when indicated), and safety precautions.

**Financial or Material Exploitation** is defined as the illegal or improper act of a caretaker using a client's funds, property, or assets for monetary or personal benefit, profit or gain.

## PROCEDURE

All volunteers who directly learn of observe experience or suspect abuse, neglect, or exploitation of any person shall do the following:

- A. If the victim is in immediate danger, call 911.
- B. The volunteer should notify the appropriate investigative agency (see listing below) to report the incident. All reports to these agencies will be held in the strictest confidence.
- C. Complete and turn in an Incident Report to the Volunteer Supervisor.





## List of investigative agencies

The following is a list of the investigative agencies that can be contacted to report abuse, neglect or exploitation. In the event that the investigative agency is not known, the law enforcement agency with jurisdiction of the area shall be the designated agency to receive the report.

### **Delaware County Department of Job and Family Services**

60 years old or older: **Adult Protective Services (APS)**

Under 18 years old: **Children's Services**

(740) 833-2300

Mon – Fri / 8:00 AM to 4:30 PM

After-hours emergency calls:

Sheriff's Dept: (740) 833-2800

Police Dept: (740) 833-1111

### **Delaware Board of Developmental Disabilities**

18 years or older with a developmental disability

(740) 201-3600 or (800) 474-9787

### **Access Ohio**

18 years or older with severe mental illness:

(740) 369-4482

Disability Rights Ohio (formerly Legal Rights Service)

(614) 466-7264 or (800) 282-9181

The victim shall be notified by the jurisdictional agency that a report has or will be made, provided that neither the victim nor the reporting agent believes their safety to be in jeopardy. When a report is made, the staff member, volunteer or contractual worker shall work with the investigative agency and other involved agencies, to the extent permitted by law to assist the investigative agency.

If the victim is a client, Care Consultants will notify the Client Services Supervisor of the suspected abuse and reports to Adult Protective Services and all interactions will be documented in the In-Home Care database.

## **Ohio Revised Code**

In accordance with ORC Section 5101.61(A) "Reporting abuse, neglect or exploitation", any senior service provider and any person engaged in social work or counseling having reasonable cause to believe that an adult is being abused, neglected, or exploited or is in a condition which is the result of abuse, neglect, or exploitation shall immediately report such belief to the county Department of Job and Family Services.



## **Volunteers who Allegedly Abuse, Neglect and/or Exploit Clients**

SourcePoint takes allegations of abuse, neglect or exploitation seriously. Once the allegation is reported we will promptly, thoroughly and impartially initiate an investigation to determine whether there is a reasonable basis to believe that abuse, neglect or exploitation has been committed. Our investigation may be undertaken by either an internal team or we may hire an independent third party. Volunteers will cooperate fully with any investigation conducted either internally or externally by law enforcement or designated agencies, and SourcePoint may refer the result of our internal investigation to those agencies. We reserve the right to place the subject of the investigation on an involuntary leave of absence, or reassign that person to responsibilities that do not involve personal contact with our clients. To the fullest extent possible, but consistent with our legal obligation to report suspected abuse, neglect or exploitation to appropriate authorities, we will endeavor to keep the identities of alleged victims and investigation subject confidential.

If the investigation substantiates the allegation, management will terminate the subject's relationship with SourcePoint. Failure to cooperate with an investigation will also result in termination of any existing relationship with SourcePoint.

## **Retaliation Prohibited**

We prohibit any retaliation against anyone, including an employee, volunteer, or client, who in good faith reports abuse, neglect or exploitation, alleges that these things are being committed or participates in an investigation. Potentially false or malicious accusations of abuse, neglect or exploitation are prohibited.

A volunteer who improperly retaliates against someone who has made a good faith allegation of abuse, neglect or exploitation or intentionally makes a false allegation will be terminated from their volunteer assignment.

## **Volunteer Complaints / Grievances**

### **POLICY**

- A. A dispute made by a volunteer, which involves complaints against a staff member or another volunteer or questions of policy interpretation or the application of hours and terms, shall be handled in accordance with the procedures outlined below.
- B. If the complaint is a discriminatory harassment complaint or falls under the American Disabilities Act (ADA), the complaint shall be referred to the Human Resource Manager.
- C. If a complaint is related to discrimination or discriminatory harassment, it will also be brought to the immediate attention of the Executive Director.
- D. There will be no negative action permitted against a volunteer for making a complaint.



## PROCEDURE

### A. **Step One:** Oral Complaint

1. Any volunteer with a complaint shall first discuss the matter with their Volunteer Supervisor within five (5) working days of the action giving rise to the complaint. The Volunteer Supervisor shall make every reasonable effort to resolve the complaint at this time. If the complaint is against the Volunteer Supervisor, skip to Step Three.
2. If the volunteer is not satisfied with the response, the volunteer may elect to proceed to Step Two.

### B. **Step Two:** Written Complaint

1. The volunteer shall document the complaint and deliver the written complaint to the Volunteer Supervisor within five (5) working days of the receipt of the response in Step One.
2. The Volunteer Supervisor shall confer with their manager and make every reasonable effort to resolve the complaint at this time.
3. If the volunteer is not satisfied with the response, the volunteer may elect to proceed to Step Three.

### C. **Step Three:** Face-to-Face Meeting

1. The volunteer meets with the Volunteer Supervisor and Department Manager.
2. The volunteer shall meet with the Department Manager and Volunteer Supervisor within five (5) working days of receipt of the response in Step Two to discuss the issue and proposed solution. The Department Manager shall schedule a meeting within five (5) working days of the request for a meeting.
3. The Department Manager shall issue a decision within five (5) working days following the meeting.
4. The decision of the Department Manager shall be final and binding on all parties.

## Inactivation Policy

### POLICY

There are a variety of reasons a volunteer may have to step away from their volunteer assignment. This policy addresses the timing of a volunteer being inactivated and requirements upon returning to the same or different volunteer position after an extended absence.

- A. After eighteen (18) months of no hours / no contact, a volunteer will be inactivated and their record will be archived unless specific arrangements, such as a leave of absence, are made with the Volunteer Recruiter.
- B. Volunteers may be inactivated prior to eighteen (18) months in certain cases such as relocation, changes in health, or at the volunteer's request.



- C. In special circumstances, the Volunteer Recruiter may elect to maintain an 'Active' status in spite of a volunteer's lengthy absence.
- D. Upon returning, the Volunteer will be required to submit to a background check and repeat the Volunteer Orientation.

## **PROCEDURE**

- A. The Volunteer Supervisor will attempt to contact the Volunteer prior to inactivation.
- B. If the Volunteer cannot be reached, the Volunteer Recruiter may elect to inactivate the Volunteer.

## **Workplace Violence**

### **POLICY**

The safety and security of employees, volunteers, contractors, members and visitors are of vital importance to SourcePoint. Therefore, threats, threatening behavior, or acts of violence against another person's life, health, well-being, family, or property will not be tolerated. The purpose of this policy is to provide guidance to volunteers of SourcePoint, should they encounter a situation they believe is, or could result in, an act of violence.

- A. The word violence in this policy shall mean an act or behavior that:
  - 1. Is physically assaultive.
  - 2. A reasonable person would perceive as obsessive (e.g., intensely focused on a grudge, grievance, or romantic interest in another person and likely to result in harm or threats of harm to persons or property).
  - 3. Consists of a communicated or reasonably perceived threat to harm another individual or in any way endanger the safety of another.
  - 4. Would be interpreted by a reasonable person as carrying a potential for physical harm to the person.
  - 5. A reasonable person would perceive as intimidating or menacing.
  - 6. Involves carrying or displaying weapons, destroying property, or throwing objects in a manner reasonably perceived to be threatening.
  - 7. Consists of a communicated or reasonably perceived threat to destroy property.
  
- B. SourcePoint prohibits the following:
  - 1. Any act or threat of violence by a volunteer against another person's life, health, well-being, or property.
  - 2. Any act or threat of violence directed at a volunteer that would endanger their life, health, well-being, or property.



3. Any act or threat of violence including, but not limited to, intimidation, harassment, or coercion.
4. Any act or threat of violence which endangers the safety of employees, volunteers, clients, contractors, members and visitors.
5. Any act or threat of violence made directly or indirectly by words, gestures, or symbols.
6. Use or possession of a weapon on SourcePoint's premises or an area that is controlled by, or associated with, SourcePoint, except as required in the line of duty (i.e., law enforcement).

C. The most common situations where workplace violence is likely to occur are as follows:

1. **Dealing with the Public:** Violent situations could occur in volunteer contact with the client or the client's family. While SourcePoint has a strong commitment to service to older adults, we will not tolerate volunteers being subjected to verbal or physical abuse by the clients or their families.
2. **On Assignment:** Situations could occur where relationships between volunteers, or between a volunteer and a supervisor, result in strong negative feelings by the individuals involved.
3. **Off Assignment:** A volunteer could become involved in a personal, criminal or non-criminal dispute with a co-worker, family member, or neighbor during the volunteer's non-working hours. SourcePoint has an expectation that all volunteers will act in a kind, respectful way to all people with whom they come in contact and will refrain from any act of violence towards any other person while on- or off-assignment.
4. **Incidents Requiring Restraining Orders:** If a violent situation escalates, individuals sometimes secure restraining orders from the courts. If a volunteer requests such a restraining order, the volunteer should include SourcePoint, as well as the volunteer's place of residence, in the order. All volunteers who apply for, obtain, or are the subject of a restraining order which lists SourcePoint's property as being a protected area, must provide to their supervisor a copy of the petition and declarations used to seek the order, a copy of any temporary protective or restraining order which is granted, and a copy of any protective or restraining order which is made permanent.

D. The possession or use of dangerous weapons is prohibited on SourcePoint property, in SourcePoint vehicles, or in any personal vehicle which is used for SourcePoint business or is parked on SourcePoint property, except as hereinafter provided.

1. A dangerous weapon is defined as:
  - A loaded or unloaded firearm.
  - A weapon, device, electronic stun weapon, chemical substance, or other material that, in the manner it is used, or could ordinarily be used, or is intended to be used, is readily capable of causing serious bodily injury.



2. Exceptions: Individuals may possess a firearm on SourcePoint property if the individual is employed in the capacity of a law enforcement officer and is engaged in law enforcement activities.
3. See the Concealed Carry policy and procedures in the following section for more detail on carrying concealed weapons.

## PROCEDURE

- A. Any volunteer who makes substantial threats, exhibits threatening behavior, or engages in violent acts on SourcePoint's property shall be removed from the premises as quickly as safety permits and terminated from their volunteer assignment. SourcePoint will initiate the appropriate response, which may include criminal prosecution of the person(s) involved.
- B. It is a requirement that all volunteers report, in accordance with this policy, any behavior that compromises SourcePoint's ability to maintain a safe work environment. All reports will be investigated immediately and kept confidential, except where there is a legitimate need to know. Even without an actual threat, volunteers should report any behavior they have witnessed which they regard as threatening or violent, when that behavior is assignment-related or might be carried out on a SourcePoint-controlled site, or is associated with SourcePoint volunteering.
- C. Volunteers must report all incidents of suspected or potential violence to their Volunteer Supervisor. Do not take the position that the incident is too minor to report or that it does not appear to be a "real problem." Do not wait until it is too late to be proactive.
- D. Volunteer Supervisor Responsibilities: Volunteer Supervisors are responsible for assessing situations, alerting the appropriate authorities, making decisions about the appropriate response, and responding to reports of, or knowledge of, activities that have occurred at SourcePoint or that involved a volunteer(s) of SourcePoint.
- E. When any actual, potential, or suspected incident of violence is brought to the attention of a Volunteer Supervisor, the supervisor or designee shall immediately evaluate the severity of the situation and have the volunteer reporting the incident fill out an Incident Report. If it is concluded that an actual act of violence has occurred or if there is a likelihood that violence could result, the Volunteer Supervisor or designee shall alert the police.
- F. Volunteers found guilty of violence will be terminated from their volunteer assignment.

## Concealed Carry

### POLICY

The safety and security of employees, volunteers, visitors, contractors, members and visitors are of vital importance to SourcePoint. Further, carrying a concealed weapon is not part of anyone's assignment responsibility; and such activity does not arise in the course or scope of volunteer service.



SourcePoint prohibits anyone from knowingly possessing, having under the person's control, conveying or attempting to convey a deadly weapon or dangerous ordnance or holster onto SourcePoint's premises unless otherwise authorized by law.

- A. SourcePoint specifically prohibits volunteers from engaging in the following activities:
  - 1. Carrying a firearm or other weapon on your person or in your vehicle while on assignment, whether licensed or not to do so.
  - 2. Possessing a weapon or firearm on any parking area owned, leased, or controlled by SourcePoint, whether or not contained in a vehicle.
  - 3. Displaying a weapon or firearm while on assignment. Should a volunteer display a weapon or firearm, whether in the facility or on the parking lot, such action will be considered a threat and will be prosecuted.
  - 4. Displaying an empty handgun holster on their person while on assignment.
- B. Any violation of the above activities will result in immediate volunteer termination.

## **PROCEDURE**

- A. Any volunteer who witnesses any prohibited activities as defined in this policy must immediately report such activity to their Volunteer Supervisor.
- B. If the witnessed activity is a situation that rises to the level of "workplace violence," refer to the Workplace Violence policies and procedures contained in this manual.

# **Emergency Response Plan**

## **PURPOSE**

The purpose of this policy is to establish a procedure for the safe and orderly handling of emergencies affecting employees, volunteers, and visitors in the SourcePoint facility located at 800 Cheshire Road, Delaware.

## **DISTRIBUTION**

This policy is distributed to all volunteers who serve in the SourcePoint building on Cheshire Road.

## **DEFINITIONS**

**Management Team:** The team is made up of the Executive Director, Directors, Managers and Supervisors.



**Medical Response Team (MRT):** The MRT is a group of employees who are certified in lay responder first aid, CPR, and the use of an AED (automated external defibrillator). The team is trained to recognize and respond appropriately to cardiac, breathing, and first aid emergencies until advanced medical personnel arrive and take over.

**Emergency First Aid Response Team (“ERT”):** The Emergency First Aid Response Team is a group of employees that are trained to be prepared for any illness/harmful situation from minor cuts to potential cardiac events. They are activated to deploy via in-house paging. Once activated, they evaluate a situation, activate EMS if deemed necessary, control the immediate environment, provide supportive care in accordance to training until EMS arrives, and report status and event information to EMS upon their arrival. For minor events, first aid treatment is provided with a strong recommendation to seek evaluation by a medical professional. The group has been provided with basic first aid supplies, glucose shots (for diabetic events) and three strategically placed defibrillator units.

**Emergency Responders:** This includes public and safety officials including police, fire, and EMS personnel.

**Evacuation Routes / Egress Maps:** Diagrams of the building indicating the nearest and safest route for exiting the building in an emergency. These can be found at all entrances to the building and elsewhere throughout the building.

**Evacuation Meeting Area:** The designated areas outside of the building where all employees, volunteers and visitors gather when the building is evacuated. The designated area is dependent upon each person’s location at the time of the occurrence. Egress routes and gathering areas are shown on the fire egress plans posted throughout the facility. Any person who cannot evacuate the lower level of the building by foot will gather in the southwest rescue area located in the stairwell doorway area by Room 128.

**Tornado Safe Area:** The designated area inside the building, the tornado safe area is a hallway located in the southwest corner of the lower level, in the location of Room 123. In the event that Pool patrons do not have enough time to reach the safe area, an alternative safe area is the showers in the men’s locker room.

**Tornado Watch:** This means that the conditions are favorable for the formation of a tornado.

**Tornado Warning:** This means that a tornado or funnel cloud has been sighted.

## **POLICY**

Whenever any employee or volunteer becomes aware of an emergency situation such as a disturbance that is out of control, fire, an injured person, security incident, or weather emergency, they shall follow the actions prescribed in this policy as well as contacting their Volunteer Supervisor immediately.

The management team is responsible for coordinating actions to respond to emergencies in a way that aids in the protection of everyone in the building. This includes, but is not limited to, the following: maintaining emergency response information in an easily accessible place; reviewing emergency plans annually including evacuation routes and egress maps; evacuating when an emergency arises; communicating instructions to everyone during an emergency situation; advising





responders of details concerning the situation; determining false alarms; and coordinating a response team to deal with mental health, counseling, or healing needs as deemed appropriate.

This policy cannot answer every question that may arise or solve every problem. Good judgment and common sense coupled with calm and positive action will contribute immensely to everyone's safety.

## **GENERAL INFORMATION**

### **A. Medical Response Team (MRT)**

The MRT is prepared to give immediate care to an injured or ill person and decide whether advanced medical care is needed. This group of staff members is equipped to deploy via in-house paging, evaluate a situation, activate MRT if deemed necessary, control the immediate environment, provide supportive care until EMS arrives in accordance with their training, and report status and event information to EMS upon their arrival. For minor events, first aid treatment is provided with a strong recommendation to seek evaluation by a medical professional. The group has been provided with basic first aid supplies and three strategically placed defibrillator units.

The following types of incidents will prompt an automatic call to EMS / 911:

1. Cardiac
2. Chest pains
3. Head Injuries
4. Difficulty breathing
5. Unconscious or having difficulty regaining consciousness
6. Unresponsiveness
7. Symptoms or knowledge of diabetic related incident
8. Falls when showing signs of a fracture, in a lot of pain, unable to rise back to their feet on their own, or showing signs of an acute medical problem that could have caused the fall.

### **B. Evacuations**

The evacuation areas for each section of the building are depicted on the egress maps located throughout the facility. Volunteers should make it a point to be familiar with these maps and the emergency evacuation routes depicted. During an emergency evacuation everyone must use the nearest and safest exit. Once outside everyone must report to the evacuation meeting area identified within the policies below. If deemed necessary, the person in charge or emergency responders may request an evacuation beyond the meeting area, depending on the nature of the emergency. Always remember: if you feel you are in imminent danger, then evacuate.

Employees will direct volunteers and visitors to evacuate in the same manner. If their personal safety is not at risk, members of the management team or the person in charge will canvas their floor areas of responsibility and report directly to the emergency responders the location of any persons not capable of exiting the building or any other critical emergency information.



The person in charge will interface with the appropriate responding emergency organizations to obtain information necessary to make decisions to protect those on site.

Depending on the nature and scope of the evacuation, the person in charge will coordinate with necessary agencies or third parties to meet the needs of those evacuating, such as transportation needs for staff or guests.

Supervisors and instructors will account for all staff and volunteers in the building. In addition, supervisors will do a visual sweep of their areas to ensure everyone has been evacuated.

Volunteers are not to leave the evacuation meeting area until told to do so by the person in charge.

Anyone who directly witnesses an emergency should provide first-person information to the emergency responders as appropriate.

### C. **Rescue and Safe Areas**

If evacuation from the lower level is not a viable option due to an emergency situation, there is a **rescue area** in the lower level stairwell across from the elevator. This area is known to local EMS and first responders. When arriving on site, first responders will automatically check this area for occupants upon arrival. **There is a panic button in this rescue area and it should be utilized by anyone seeking refuge in the rescue area.**

In the event of severe weather, occupants should proceed to safe areas, which are considered the lower level of the building. Seek hallways or rooms without windows until further instruction is received. If occupants cannot be taken to the lower level, occupants should proceed to restrooms or other interior rooms or hallways without windows.

### D. **What happens when you place a 911 call from inside the building?**

The customer service team along with members of the MRT team and the executive team all receive emails that a 911 call was placed from your location.

### E. **Incident Reporting**

Whenever an incident occurs, such as an accident, injury, medical situation, property damage, theft, etc., an Incident Report must be completed. The form includes instructions on how to complete it.

## **Medical Emergency Procedures & Equipment**

### A. **Medical Emergency Procedures**

Minor medical accident, injury, or illness:

1. Use the paging system to request the MRT (dial \*5803 and say "Medical Response Team to [your exact location] or use the paging instructions which are listed at the end of this policy). All paging instructions should be posted at all phones.



2. Notify your Volunteer Supervisor or management immediately.
3. Do not administer first aid unless you are trained and qualified, and protected from exposure to body fluids.
4. MRT will assist the injured in deciding if 911 is called or if the injured person should go to the hospital. Decisions should be made to ensure the safety and welfare of the injured person. If MRT is not available, use the guidelines below to decide if 911 should be called. Never hesitate to call 911 if you are unsure.
5. The following types of incidents will prompt an automatic call to EMS / 911:
  - Cardiac
  - Chest pains
  - Head Injuries
  - Difficulty breathing
  - Unconscious or having difficulty regaining consciousness
  - Unresponsiveness
  - Symptoms or knowledge of diabetic related incident
  - Falls when showing signs of a fracture, in a lot of pain, unable to rise back to their feet on their own, or showing signs of an acute medical problem that could have caused the fall.
6. An incident report must be completed by the injured person (if possible), any witnesses, and any employees or volunteers who witnessed or responded to the emergency. See instructions for incident reporting.

**Serious medical accident, injury, or illness:**

1. Call 911 IMMEDIATELY. Report the location of the emergency and give a description of the problem as clearly and concisely as possible.
2. Use the paging system to request the MRT (dial \*5803 and say "Medical Response Team to [your exact location]; then dial \*599 and say "Medical Response Team to [your exact location]) or use the paging instructions which are listed at the end of this policy.
3. Notify your Volunteer Supervisor or management.
4. Do not attempt to move someone who is injured. Avoid contact with blood or other body fluids. Do not administer first aid/CPR unless you are trained and qualified, and can isolate yourself from potential exposure to body fluids. Remain calm and try to keep others in the area calm.
5. An incident report must be completed by the injured person (if possible), any witnesses, and any employees or volunteers who witnessed or responded to the emergency. See instructions for incident reporting.
6. The person in charge will contact the emergency contact for the injured person.



### **Contaminants or Infestation:**

1. Food borne illness – see kitchen staff for Kitchen Policy on food borne illness for further instructions.
2. Airborne - if you have questions or concerns about air quality, please report it to the person in charge.
3. Water/pool contaminants - see Enrichment Center staff for Enrichment Center Policy on aquatics procedures

### **Hazardous chemicals:**

1. See hazard communication program located in the following departments or areas: Swimming Pool and Kitchen.

### **Injury or Illness While On Travel:**

1. Illness or injury while on volunteer assignment, whether on-site or off-site, **must be reported promptly to your Volunteer Supervisor**. An Incident Report Form must be completed.

## **B. Emergency Medical Equipment**

Standard first aid kits are located in the following areas, and are the responsibility of the Human Resources Department to service and maintain.

1. Kitchen
2. Maintenance
3. Front desk
4. Staff Lounge
5. Gathering Room
6. Fitness Center
7. Pool
8. Art Room
9. Independence Room
10. Enrichment Center Office Suite

### **Automated External Defibrillators (AEDs):**

Only the MRT, trained staff, and emergency responders should attempt to use this life-saving piece of equipment. There are 3 AEDs located in the building in the following areas:

1. Main Customer Service desk
2. Gathering Room
3. Fitness Center
4. Pool



### **Eyewash Stations:**

There are two eyewash stations in the building in the following locations, and instructions are posted at the stations.

1. Kitchen
2. Maintenance room

### **Evacuation Chair:**

There is an evacuation chair located in the lower level rescue area, located in the stairwell across from the elevator, and near Independence Room (#123). This chair is primarily a tool for the emergency responders due to the strenuous nature of utilizing this equipment.

## **Procedures for Security, Personal Safety, and Threats**

Security incidents may involve, but are not limited to, situations such as attempted suicide, hostages, physical attack, domestic disputes, firearms, etc. For any situation that indicates a violent act maybe about to occur:

- Call 9-1-1 IMMEDIATELY.
- If necessary, the supervisor or a member of management will make a decision about the need to evacuate personnel.
- Volunteers should remain calm and follow the instructions of their Volunteer Supervisor or the law enforcement personnel on the scene.
- An Incident Report Form should be completed by all involved (see Incident Reporting policy).

### **A. Active Shooter**

An active shooter situation involves one or more individuals intent on causing physical harm and/or death. Once law enforcement arrives, it is critical to follow their instructions and cooperate with their requests, as they are in command and our agency is now a crime scene.

- As soon as it is safe to do so, the first person to notice an active shooter or armed intruder should call 911 and notify the Volunteer Supervisor who will take appropriate measures to alert authorities. Provide as much information to the 911 dispatcher as possible.
- Notification to all building occupants will begin immediately via paging, phone, and texting. Provide as much information as possible, including the following details: Who? What? Where? When? How? Supplying answers to those basic questions will give occupants of the building the information needed to make informed decisions.



- When possible, a staff member will stop any arriving staff or guests from entering the building or grounds.
- When possible and without putting oneself at risk, staff will assist guests, members and volunteers to exit the building or find a place to hide and barricade themselves.
- Everyone should assess their own situation for the best survival options and proceed accordingly.

The recommended strategy for surviving an active shooter situation is:

- **Run.** Run as fast and as far away as possible, exiting the building and evacuating to a remote location off premises. Use landscaping and buildings to hide your evacuation if possible.
- **Hide.** If you are unable to run, then you must seek out a place to hide until first responders can arrive. Find a place to hide and stay there until help arrives and instructs you. Barricade your hiding spot, so the intruder cannot reach you.
- **Fight.** If you are unable to run or hide, you must be ready to fight for your life, using anything you can find to defend yourself or others, hopefully interfering with the shooter's ability to fire. Throw books, computer equipment, phones, chairs, or anything you have available.

## B. Panic Buttons

Panic buttons should be used for situations involving personal safety, security, or personal threats of bodily harm. These serve as a quicker, easier, and more discreet way of calling 911 for police assistance. These buttons **cannot** be used for medical emergencies. Volunteers who work in the following locations will be trained on the use of panic buttons that should be used in the event of a public threat:

### Cheshire Location

- Insurance Counseling Offices ( 1 button in each - wall button)
- Fitness Center desk (button under desk)
- Pool office (wall button)

### South Office Location

- Front desk (button under desk)

## C. Bomb Threat or Suspicious Package

If a bomb threat is called in by phone (most common form of bomb threats):

- Remain calm and keep the caller on the line for as long as possible. **DO NOT HANG UP** even if the caller does.



- Push a panic button or attract the attention of a staff member to contact police.
- Listen carefully, be polite and show interest, try to keep the caller talking to learn more information, write down all information you learn.
- List of items to gather information about:
  - When will the bomb explode?
  - Where did you place it?
  - What does it look like or what type of package is it in?
  - Why did the caller place a bomb here?
  - What is your name?
  - Can you hear background noises?
  - Does the caller have an accent or speech pattern?
  - If you have caller ID, write down caller's phone number.

If a bomb threat is received by handwritten note, email or text message

- Call 911 and notify a staff person in charge.
- Do not delete the email or text message.
- Handle the note as minimally as possible.

If a suspicious package is found

- If a suspicious item is found that does not belong in the building, notify the staff person in charge, and do not touch it.
- The staff person in charge will assess and decide whether or not to call 911.

### **Bomb Threat - General Guidelines**

- Call 911.
- Always notify the staff person in charge.
- The staff person in charge will immediately be in communication with law enforcement.
- Evacuations - law enforcement will decide whether or not to evacuate, because evacuations can create a greater exposure to danger. It is recommended everyone remain in their area until police give the instruction to evacuate. The supervisor in charge could find it necessary to evacuate depending on their assessment of the threat risk. Volunteers should cooperate with any decision to evacuate the building.
- Evacuations - can be done using the paging system, by pulling the fire alarm handle, via agency phone, or by a physical sweep of the building.
- DO NOT touch, move, adjust, change, or use any electrical or communication device, i.e. walkie-talkie, cell phone, etc. These items can detonate a bomb.
- Upon arrival, law enforcement will instruct as necessary regarding a search of the premises.
- Be available to be interviewed by law enforcement and complete a Bomb Threat Form



## Procedures for Weather-Related Emergencies

### A. Severe Thunderstorm, Flooding, or Snow

- The Severe Weather Closing Procedure provides instructions that the staff person in charge will use when determining if conditions require that SourcePoint close early, or open later, than normal hours.
- In the case of severe thunderstorms or winds, the staff person in charge will advise employees, volunteers, and visitors if cautions should be taken, or if relocation to a safe area is needed.
- The staff person in charge will make an announcement over the PA system if relocation to safe areas is needed.
- Staff will direct everyone to the lower level hallways. Stay in the hallway area away from large open spaces.
- Do not attempt to leave the building.
- Do not use the elevators.
- Stay away from glass windows and exterior doors that can be blown out or broken.

### B. Tornado

#### Tornado Watch:

- A watch means there is the potential or that conditions exist for a dangerous weather event.
- After receiving a tornado watch alert, the staff person in charge should review the evacuation and shelter plan and be prepared to take action.

#### Tornado Warning:

- A warning means that a dangerous weather event is imminent, and that immediate action must be taken to protect life and property.
- If there is a tornado warning for Delaware County, the emergency siren located at the southwest corner of the facility will be activated.
- If the tornado siren is heard, immediately notify the staff person in charge who will make an announcement over the intercom system. The announcement should state, "Tornado Emergency, Seek Shelter Immediately" and should be repeated several times.
- Staff will begin directing everyone to the lower level hallways. Stay in the hallway area away from large open spaces.
- For your safety do not attempt to leave the building.
- For your safety do not use the elevators.
- Stay away from glass windows and exterior doors that can be blown out or broken.





- If you cannot get to the lower level, seek small rooms located in the center of the building, including restrooms which do not have windows.
- Get under heavy objects for protection.
- Do not leave the safe area until instructed to do so by the staff person in charge or EMS responders.
- The siren located on our property does not stay on until the warning has been lifted; it will recycle periodically during the warning.
- **The staff person in charge must call 911** to find out if the warning has been lifted before instructing individuals to leave the safe area.

## Procedures for Infrastructure Emergencies

### A. Fire

- When the fire alarm sounds, the building must be evacuated immediately, without exceptions.
- If a fire is discovered, sound the fire alarm. The alarm can be sounded by pulling on the handles of the manual red fire alarms located on the walls throughout building. Volunteers should become familiar with the locations of the fire alarms.
- Once the alarm is activated, the appropriate responding agencies are notified by our 3<sup>rd</sup> party alarm call center.
- Use common sense. Do not attempt to extinguish the fire.
- Do not use the elevator.
- Follow the egress maps and evacuate as quickly and safely as possible.
- If you become disoriented, stay low because smoke rises. Crawl along the floor looking for the light of a doorway or window.
- Before opening a door, test it for heat. If a door is hot or if smoke is coming through the cracks, do not open the door. Open doors slowly; if smoke sweeps through, close the door immediately and find another exit. If another exit is not available, proceed to the nearest window and try to attract the attention of emergency responders. The emergency responders will be looking into the windows trying to spot anyone who is trapped.
- If you encounter a trapped person and cannot free them, do not place yourself at risk. Remember his/her location, exit the building, and notify the first emergency responders you see. Then go to the evacuation meeting area and notify the management team.
- Without putting themselves at risk, employees will assist and direct occupants, including volunteers, to the evacuation meeting area, which is at the back of the parking lot out of the way of emergency responders.



## Intercom Paging

In an emergency, any employee or volunteer onsite will be able to use the intercom system to notify employees and the public of the necessary action that must be taken.

To page the Medical Response Team (MRT) you must perform 2 pages:

- A. First, page for the overhead paging speakers, located throughout our facility.
  - Dial **\*599** and listen for 2 beeps, then dial "OO" – Entire Facility.
  - Calmly announce your message: "**Medical Response Team to [location].**" Repeat page twice.
- B. Second, page for the phone speaker system
  - Dial **\*5803** and say your message into the phone:
  - Calmly announce your message "**Medical Response Team to [location].**" Repeat page twice.

If you are paging for an evacuation or facility wide response, the following is an example of a calm message:

"An incident has occurred at [specific location], which requires that employees take the following action [state what action is necessary and direct people away from hazards to safety]. Follow the emergency action plan training and [choose one: remain in the building; or direct employees to a certain location]. Please take action quickly and remain calm."

## News Media

The executive director, director of communications, or their appointed designees are the only persons who should speak to the media regarding any incident at SourcePoint. If a member of the media approaches a volunteer with questions about an incident, the volunteer should direct the media to these individuals.



## HIPAA Information

### What is HIPAA?

The **Health Insurance Portability and Accountability Act** of 1996, otherwise known as the HIPAA privacy rule is a federal regulation that protects the health information of all individuals. Most of us share personal health information with our healthcare providers and our health insurers. This rule establishes guidelines and standards for the use and disclosure of client's personal health information.

### When did it take effect?

The rule was enacted on August 14, 2002, and took effect on April 14, 2003.

### If I am a volunteer or student, do I need to understand and follow the HIPAA rule?

Yes, according to the definition in the HIPAA regulation text: "workforce members include employees, volunteers, trainees, and other persons whose conduct, in the performance of work for the agency, is under the direct control of the agency, regardless of whether they are paid by the agency."

### What are the benefits of HIPAA?

- Ensures that all individuals receiving healthcare have greater access to his/her own health information and medical records.
- Ensures that healthcare providers take reasonable precautions to protect personal health information by imposing restrictions on its use and disclosure.

### What is a covered entity (CE)?

A covered entity is defined as a **health care provider, a health plan or a healthcare clearing house** that transmits any health information in electronic form. Attorneys, accountants, software vendors and others providing business services to covered entities are NOT considered covered entities.

### What is considered Protected Health Information (PHI)?

All individually identifiable health information that is used or disclosed by a covered entity in **any form, electronic, written or oral**. This includes information relating to the past, present or future physical or mental health of an individual, provision of care to an individual, or the past, present or future payment for health care provided to an individual.

### What does this mean for SourcePoint?

- All our programs are affected because we transmit electronic PHI.
- We must protect the personal health information for **all** our clients.
- We must let clients know what we are doing to protect their personal health information.

### When can I use or disclose PHI?

PHI can be used for treatment, payment and healthcare operations (TPO) without a specific authorization.



- “Treatment” means the provision, coordination or management of health care and related services among health care providers.
- “Payment” means the activities of health care providers to obtain payment or be reimbursed for their services.
- “Healthcare operations” means administrative, financial, legal and quality improvement activities of a covered entity that are necessary to run its business and to support the core functions of treatment and payment.

#### **What is the minimum necessary standard?**

Volunteers are to use only the minimum amount of protected health information that is necessary to perform their jobs. SourcePoint program directors, supervisors, and coordinators will determine the amount of information that each volunteer needs access to in order to complete their job. SourcePoint will make reasonable efforts to limit the PHI used, disclosed or requested.

- *An exception to this rule is the use or disclosure of records for treatment purposes.*

#### **What is the Notice of Use of Private Health Information?**

This is the privacy notice developed by SourcePoint that describes in detail, with examples, how SourcePoint will use and disclose protected health information. This notice is available in print and on the SourcePoint website [www.growingolder.org](http://www.growingolder.org) and is posted at the site of service when possible.

#### **What is a privacy officer and who is it at SourcePoint?**

The privacy officer is the individual at SourcePoint who has the responsibility to interpret and implement the HIPAA regulations. The privacy officer is responsible for investigating any complaints of privacy violations. The SourcePoint privacy officer is Fara Waugh. She can be reached at 740-363-6677 or by writing to her at SourcePoint, 800 Cheshire Road, Delaware, OH 43015.

#### **What are the patient’s privacy rights?**

- To receive the “Notice of Use of Private Health Information” on the first date of service.
- To request restrictions on the use and disclosure of PHI.
- To obtain copies of medical records.
- To inspect and correct PHI.
- To contact the privacy officer with any concerns.

#### **What are the duties of the SourcePoint?**

- To develop privacy policies, procedures and forms.
- To educate the workforce including volunteers.
- To determine how much information each volunteer needs in order to complete his/her job.

#### **Where can I get more information on HIPAA?**

Contact the privacy officer, Fara Waugh at 740-363-6677.



## Incident Report

Use this form to report accidents, injuries, medical situations, property damage, theft, etc. If possible, the report should be completed within 24 hours of the event. Submit completed reports to the Director of Operations.

INFORMATION ABOUT PERSON INVOLVED IN INCIDENT				
Full Name:				
Home Address:				
Employee <input type="checkbox"/>	Volunteer <input type="checkbox"/>	Member <input type="checkbox"/>	Client <input type="checkbox"/>	Guest <input type="checkbox"/>
Home Phone:	Cell:	Work:		

INFORMATION ABOUT THE INCIDENT		
Incident Type:	Incident Date:	Incident Time:
Location of Incident:		
Description of Incident (what happened, how it happened, factors leading to the event, what was damaged, etc. Be as specific as possible, and attach additional sheets if necessary):		
Were there any witnesses to the incident: Yes <input type="checkbox"/> No <input type="checkbox"/> <small>If yes, please attach separate sheet with names, addresses, and phone numbers.</small>		
Was the individual injured? If so, describe the injury (laceration, pain level, etc.), the part of body injured, and any other information known about the resulting injuries:		
Was medical treatment provided: Yes <input type="checkbox"/> No <input type="checkbox"/> Refused <input type="checkbox"/>		
Was EMS called: Yes <input type="checkbox"/> No <input type="checkbox"/> Refused <input type="checkbox"/>		

Report Submitted by (print name):	
Signature:	Date:

Signature of Person Involved:	Date:
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FOR OFFICE USE ONLY	
Report Received by:	Date:

*Notes and follow-up information on reverse side of form.*

**NOTES**

**FOLLOW-UP ACTION**

<i>Date</i>	<i>Action Taken</i>	<i>By Whom</i>

