



Volunteer Policy and Procedures

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Purpose of this Manual

SourcePoint's mission is to serve Delaware County adults who want to thrive after 55. To this end, SourcePoint encourages and accepts the involvement of volunteers to serve these adults through the various programs and activities we offer. 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 Department. If the complaint is against the Volunteer Supervisor, the volunteer may inform the Human Resources Department directly by calling SourcePoint at 740-363-6677 and asking for the Human Resources Department.

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

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.

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. Volunteers are encouraged to wear their SourcePoint shirt.
- C. Volunteers are requested to wear their ID badges while volunteering.

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

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 number** 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 database 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.

Required Insurance Coverage
1. Liability coverage -- \$100,000 per person; \$300,000 per accident
2. 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. While on SourcePoint business, volunteers are expected to operate their personal cars in a lawful and safe manner.
- D. A driver with the following citations on his or her driving record is ineligible for SourcePoint driving assignments:
 - 1. 3 speeding tickets within a 3-year period
 - 2. 2 at-fault accidents within a 3-year period
 - 3. 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.

In the Event of an Auto Accident

VOLUNTEER POLICY

When a volunteer has an automobile accident while on SourcePoint business, he or she follows the procedures stated below to ensure the safety of those involved as well as proper documentation for the volunteer, SourcePoint, and any individual affected by the accident.

PROCEDURE

In order to ensure safety, obey the law, and start the volunteer's insurance claim process, follow these steps whether the volunteer was at fault for the accident or not.

- A. **In the case of injuries or major damage, call 9-1-1** or ask someone else to do so. Anyone seriously injured should not move while waiting for emergency personnel. If possible, check on other passengers in the vehicle.
- B. **Get to safety.** When possible, physically move to the side of the road or a sidewalk. If the vehicle is safe to drive and is causing a hazard where it is, pull it to the side of the road. Otherwise, leave it and get to safety.
- C. **For minor accidents, call the Police Non-Emergency Number:**
 - Delaware County: 740-203-1111
 - Franklin County: 614-645-4545
 - Marion County: 740-387-2525

Whether an accident is a minor fender-bender or a major collision, calling the police is important. The responding officers will fill out an accident report and document the scene. The volunteer's insurer may ask for a copy of the police report to assist with the claims process.

- D. **Wait for help.** Turn off the engine; turn on the hazard lights to warn other vehicles to slow down.
- E. **Exchange information.** After ensuring there are no injuries, exchange contact and insurance information with the other driver, including the following:
 - Full name and contact information

- Insurance company and policy number
- Driver's license and license plate number
- Type, color and model of vehicle
- Location of accident

Avoid discussing fault when going over the facts with the other driver. The adjuster reviewing the filed claim will determine fault based on an inspection of the vehicles/property damaged, information provided, and any supporting documentation, such as the police report or photographs from the scene.

F. Document the accident.

- **Take pictures.** Document the accident thoroughly by taking pictures of the vehicles involved from different angles. Also, take a picture of the other vehicle's license plate.
- **Take down names.** Record the names and addresses of all parties involved, including any passengers in the other vehicle.
- **Talk to witnesses.** If there were any witnesses to the accident, record their names and their contact information, as well.

G. Notify insurer to initiate the claims process. If possible, the volunteer should call his or her insurance agent while at the scene. An accident can rattle even experienced drivers. Following these steps allows volunteers and those involved in an accident to expedite vehicle repairs and claims.

H. Contact the appropriate Volunteer Supervisor. If possible, call the appropriate Volunteer Supervisor from the scene. When necessary, the supervisor will arrange for a staff member to complete a meal delivery route, a medical transport, or other duties in process.

I. Fill out an Incident Report Form. Upon the volunteer's return to SourcePoint, his or her supervisor will provide an Incident Report Form for the volunteer to complete. In the event the volunteer does not immediately return to SourcePoint, an electronic version of the form is available at www.mysourcepoint.org. There are two ways to get to the required forms:

Option 1

Scroll down to the section labeled 'Get Involved'.

Get Involved



Click on 'Volunteer'.

Scroll down and click on the 'Click here' link under 'Resources for Current Volunteers'. Then scroll down and select the form you need under 'Helpful Volunteer Forms'.



Resources for Current Volunteers

Click Here

Helpful Volunteer Forms

- Authorization for Automatic Mileage Deposit
- BMV Permission to Release Records
- Change of Mileage Designation
- Incident Reporting Forms
- Youth Volunteer Parental/Guardian Consent Form
- Volunteer Exit Survey

OR

Option 2

At the Home screen, scroll down to the very bottom of the screen and click on 'Volunteer Resources'.

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Scroll down to 'Helpful Volunteer Forms' and click on 'Incident Reporting Forms'.

Helpful Volunteer Forms

- Authorization for Automatic Mileage Deposit
- BMV Permission to Release Records
- Change of Mileage Designation
- Incident Reporting Forms
- Youth Volunteer Parental/Guardian Consent Form
- Volunteer Exit Survey

Print out and complete the appropriate Incident Report Form and return it to your Volunteer Supervisor.

Time and Mileage

POLICY

Volunteers are required to track all hours and mileage served for SourcePoint. The Volunteer Information Center (VIC) includes a time-tracking module called VicTouch that records volunteers' service hours. VicNet is SourcePoint's online portal for volunteers who track off-site time and mileage. Some assignments require paper timesheets. Refer to the examples of Timesheet and Mileage reports in the Appendix or click on the following link: <https://mysourcepoint.org/current-volunteers/>.

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 driven (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.

Confidentiality

POLICY

SourcePoint volunteers will protect the client's right to privacy by holding in confidence all information obtained while providing service unless confidential information required by a court order.

- 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 information they want to be 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. If a member of the media approaches a volunteer with questions about an incident, the individual should be referred to the CEO and a "No Comment" response is to be given regardless of whether the individual is a client or not.

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

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.

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:
1. The adult provides continuous supervision
 2. The child's behavior is not disruptive to staff, other volunteers, members or clients
 3. 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.

Substance Use

POLICY

Drugs, alcohol, smoking and vaping are 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.

Volunteer 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 CEO.
- D. There will be no negative action permitted against a volunteer for making a complaint.

PROCEDURE

The volunteer discusses the grievance with their Volunteer Supervisor and/or the Volunteer Recruiter, who shall make every reasonable effort to resolve the complaint as quickly as possible. If the volunteer is not satisfied with the response, the Volunteer Recruiter will discuss alternative volunteer opportunities with the volunteer.

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	Unacceptable Gifts
<ul style="list-style-type: none"> ▪ Baked goods ▪ Hand-crafted gifts ▪ Small mementos/trinkets ▪ Thank-you cards 	<ul style="list-style-type: none"> ▪ 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

All volunteers 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 Volunteer Recruiter.
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 Volunteer Supervisor or the Volunteer Recruiter, 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 termination of my service to SourcePoint.

PROCEDURE

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

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.

PROCEDURE

- 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

POLICY

It is the policy of SourcePoint that all staff and volunteers are mandated to report any suspicion or observance of abuse, neglect or exploitation of any child, older adult, vulnerable individuals, or animals to law enforcement or the designated investigative agency. Volunteers are expected to also report any incidents or concerns to their Volunteer Supervisor.

SourcePoint follows **ORC section 5101.63 reporting abuse, neglect, or exploitation of an adult**, which means any individual having reasonable cause to believe an adult is being abused, neglected, exploited, or is in a condition that is the result of abuse, neglect, or exploitation shall immediately report such belief to the county department of jobs and family services.

SourcePoint follows **ORC section 2151.421 reporting abuse or neglect of a child**, which means any individual who knows, or has reasonable cause to suspect based on facts that would cause a reasonable person in a similar position to suspect, that a child under eighteen years of age, or a person under twenty-one years of age with a developmental disability or physical impairment, has suffered or faces a threat of suffering any physical or mental wound, injury, disability, or condition of a nature that reasonably indicates abuse or neglect of the child, shall immediately report that knowledge or reasonable cause to suspect a child is being abused or neglected, or is in a condition that is the result of abuse or neglect shall immediately report such belief to the county department of jobs and family services.

SourcePoint follows **ORC section 959.01 - 959.131 reporting abuses related to domestic animals**, which includes **ORC section 959.07 reporting a violation of a companion animal**.

PURPOSE

The purpose of this policy is to provide information, guidance, and procedures to address incidents of abuse, neglect, or exploitation, specifically to:

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

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 of an individual 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.

Neglect of a child means any of the following when committed by a person responsible for the care of a child. Failure to provide reasonable supervision according to the standards of care appropriate to the age, mental, and physical condition, or other special needs of the child that result in sexual or physical abuse of the child by any person; failure to develop a process for administration of prescribed medications; failure to provide properly for the necessary subsistence, education, medical care, or other care necessary for the health and well-being of the child.

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.

Abuse related to animals is defined as abandoning, poisoning, being cruel, tormenting, maiming, beating, starving, injuring or causing pain due to confinement, fighting including dogfighting, or using devices not designed for the intended purpose.

PROCEDURE

Background Checks

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. SourcePoint determines if volunteers are required to submit to a background check based on the volunteer's assignment.

Education and Acknowledgment

All volunteers receive training during their orientation process, which includes how to recognize abuse, neglect or exploitation. Volunteers are required to acknowledge in writing the completion of the training received at orientation, as well as receipt of all volunteer policies and procedures.

Reporting Procedure

Any volunteer who has reasonable cause to believe that an adult, child, or animal has been abused, neglected, or exploited or is in a condition that is the result of abuse, neglect, or exploitation shall immediately take the following steps.

For adults and children

1. Call 9-1-1 if the victim is in immediate danger.
2. Contact the Delaware County Department of Job and Family Services at 740-833-2340 or 800-899-3180.

For companion animals

1. Complete the form at the following link: <https://hsdcoh.wufoo.com/forms/zt4tbao1yh8z0u/>
2. Leave a voicemail at 740-369-7387 with your name, nature of complaint, and a valid telephone number. A humane agent will return your call. Note that the humane agent may ask for a signed, written statement, if needed.
3. For stray dogs in Delaware County, contact the Delaware County Dog Warden at 740-368-1915.
4. For animal cruelty issues in the City of Delaware, contact Delaware Animal Control at 740-203-1111.
5. For animals locked in a hot car, call 9-1-1.

After contacting the appropriate agency found above, the volunteer shall:

1. Immediately advise their Volunteer Supervisor.
2. Be available for follow-up by the investigative agency.
3. Complete and turn in an "Incident Reporting Form" to the Volunteer Supervisor.

Reporting Protection

Per the ORC sections identified in 'POLICY' above, any individual who reports in good faith any incident relating to abuse, neglect or exploitation shall be immune by law from civil or criminal liability.

Volunteers who Allegedly Abuse, Neglect and/or Exploit Clients and/or Companion Animals

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.

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 one year (12 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. Upon returning, the Volunteer may 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.

IT Acceptable Use Policy

POLICY

This policy establishes the acceptable usage guidelines for all technology resources. These resources can include, but are not limited to, the following equipment:

- A. Computers - Desktop Computers, Laptops, Mobile Devices, Servers, etc.
- B. Software - Operating Systems, Application Software, Mobile Device Apps, etc.
- C. Resources - Group Drive File Storage, Website File Storage, Email Accounts, Social Networking Accounts, etc.

This policy applies to all employees, contractors, consultants, temporaries, providers, volunteers, and other workers, including all personnel affiliated with third parties, such as vendors.

Users should be aware that all SourcePoint-owned equipment, network infrastructure, and software applications are for official use only. In addition, all data residing on equipment is also the property of the agency and, therefore, should be treated as such and protected from unauthorized access.

The nature of our activities must be in compliance to all HIPAA rules to safeguard electronic Personal Health Information (ePHI) on the network.

The following activities provide a general roadmap to use technology resources in an acceptable manner:

- A. All passwords used to access systems must be kept secure and protected from unauthorized use.
- B. No user account can be shared between individuals. Authorized users are responsible for the security of their own passwords and accounts.
- C. All devices residing on or connecting to the SP network shall be continually executing approved and current virus-scanning software.
- D. Volunteers must use extreme caution when opening email attachments received from unknown senders.
- E. Electronic communication from SP resources is considered official representation.
- F. Personally identifiable information/ePHI cannot be sent via electronic means unless transferred within the internal network, utilizing approved encryption or through secure VPN connections in accordance to HIPAA policy.
 - 1. Specifically, all ePHI sent through Exchange (Outlook) must be encrypted with the appropriate Microsoft 365 Outlook message encryption type or in an attachment, password protected with approved encryption, such as 7zip.
 - 2. The FAMcare application and Microsoft Outlook Encryption is currently the only approved internal application to send ePHI.
- G. Off-site work should be completed via a secure VPN connection so that no data is transferred off-network.
- H. All devices should be kept secure and locked when not attended to protect unauthorized users from accessing secure files.

The following activities are generally prohibited. The list is by no means exhaustive but attempts to provide a framework for activities that fall into the category of unacceptable use.

- A. Under no circumstances is a volunteer authorized to engage in any activity that is illegal under local, state, federal, or international law while utilizing agency resources.
- B. Violations of the rights of any person or company protected by copyright, trade secret, patent or other intellectual property, or similar laws or regulations, including, but not limited to, the installation or distribution of "pirated" or other software products that are not appropriately licensed for use by the agency.
- C. Revealing your account password to others or allowing use of your account by others. This includes family and other household members when work is done at home.
- D. Using a computing asset to actively engage in procuring or transmitting material that is in violation of sexual harassment or hostile workplace laws in the user's local jurisdiction.
- E. Making fraudulent offers of products, items, or services originating from any account.
- F. Any form of harassment via email, telephone, or paging, whether through language, frequency, or size of messages.
- G. Solicitation of email for any other email address, other than that of the poster's account, with the intent to harass or to collect replies.
- H. Use of unsolicited email originating from within SP networks of other Internet/Intranet/Extranet service providers on behalf of, or to advertise, any service hosted by or connected via our network.

PROCEDURE

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

Workplace Violence

POLICY

SourcePoint is committed to providing a safe and professional work environment. The safety and security of all employees, clients, volunteers, contractors, guests, visitors, and the public are of vital importance to SourcePoint. Therefore, threats, threatening behavior, or acts of violence made by any individual against another person's life, health, well-being, family, or property will not be tolerated.

Any individual found guilty of violence will be subject to termination of services including, but not limited to, expulsion from SourcePoint buildings, grounds, or events. Where appropriate, legal action will be pursued against persons in violation of this policy.

PURPOSE

The purpose of this policy is to provide guidance to all SourcePoint volunteers should they encounter a situation that they believe is or could result in an act of violence.

DEFINITIONS

- A. The word "violence" in this policy shall mean any act or behavior that:
 - 1. Is physically assaultive, which includes grabbing, slapping, punching, pushing, or holding an individual, or would be reasonably interpreted by a reasonable person as carrying a potential for physical harm to a person.
 - 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. A reasonable person would perceive as intimidating, bullying, coercion, or menacing.
 - 5. Involves carrying or displaying weapons, destroying property, or throwing objects in a manner reasonably perceived to be threatening, also includes a communicated or reasonably perceived threat to destroy property.

- B. SourcePoint prohibits volunteers from engaging in the following while on SourcePoint grounds, attending SourcePoint events, obtaining services from SourcePoint, on any public or private property, including electronic or tele-communication devices:

1. Any act or threat of violence against another person's life, health, well-being, or property.
 2. Any act or threat of violence including, but not limited to, intimidation, harassment, or coercion.
 3. Any act or threat of violence which endangers the safety of employees, clients, activity center members, volunteers, contractors, visitors, guests or the general public.
 4. Any act or threat of violence made directly or indirectly by words, gestures, or symbols.
 5. 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 or threatening behavior by a client's companion animal.
 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.
- 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 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 property shall be removed from the premises as quickly as safety permits and terminated from their volunteer assignment. SourcePoint will initiate an 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 an 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. When any actual, potential, or suspected incident of violence is brought to the attention of a Volunteer Supervisor, the Volunteer Supervisor or their designee shall immediately evaluate the severity of the situation and have the volunteer reporting the incident fill out a Workplace Violence 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.
- E. 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 Volunteer 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.

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.

POLICY

Whenever a 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 alerting a staff member as quickly as possible.

The management team is responsible for coordinating actions to respond to emergencies in a way that aids in the protection of all people 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 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.

DEFINITIONS AND 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.

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 staff 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 visitors to evacuate in the same manner. If their personal safety is not at risk, members of the management team or staff 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 staff 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 staff 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.

Do not leave the evacuation meeting area until told to do so by the staff 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 9-1-1 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 9-1-1 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 Form must be completed. The form includes instructions on how to complete.

Medical Emergency Procedures & Equipment

A. Medical Emergency Procedures

Minor medical accident, injury, or illness:

1. Notify your Volunteer Supervisor or management immediately.
2. Do not administer first aid unless you are trained and qualified, and protected from exposure to body fluids.
3. MRT will assist the injured in deciding if 9-1-1 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 9-1-1 should be called. Never hesitate to call 9-1-1 if you are unsure.
4. The following types of incidents will prompt an automatic call to EMS / 9-1-1:
 - 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
5. An incident report must be completed by the injured person (if possible), any witnesses, and any employees who witnessed or responded to the emergency. See instructions for incident reporting.

Serious medical accident, injury, or illness:

1. **Call 9-1-1 IMMEDIATELY.** Report the location of the emergency and give a description of the problem as clearly and concisely as possible.
2. Notify your Volunteer Supervisor or management.
3. 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.

4. 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.
5. The staff person in charge will contact the emergency contact for the injured person.

Hazardous Chemicals:

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

Injury or Illness While Volunteering:

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

Dog Bites:

1. All dog bites must be reported to the Delaware County Dog Warden, the Delaware Public Health District or the Delaware County Sheriff's Office within 24 hours of the incident for investigation. An incident report form must also be completed.
2. A dog bite is defined as any time a dog breaks the skin of a person with the dog's teeth.
3. Medical treatment is highly recommended after a dog bite to address risk for communicable diseases

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, inspection log sheets should be completed quarterly for each.

1. Kitchen
2. Front desk
3. Gathering Room
4. Fitness Center
5. Pool
6. Art Room
7. Independence Room (Basement)

Automated External Defibrillators (AEDs):

Only the MRT, trained staff, and emergency responders should attempt to use this life-saving piece of equipment.

Eyewash Stations:

There is an eyewash station in the Kitchen with posted instructions.

Evacuation Chair:

There is an evacuation chair located in the lower-level rescue area, 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:

1. **Call 9-1-1 IMMEDIATELY.**
2. If necessary, the supervisor or a member of management will make a decision about the need to evacuate personnel.
3. Volunteers should remain calm and follow the instructions of their Volunteer Supervisor or the law enforcement personnel on the scene.
4. If the panic button is pushed by accident, law enforcement must investigate the location of such button - we may not tell them to disregard it.
5. 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.

1. As soon as it is safe to do so, the first person to notice an active shooter or armed intruder should call 9-1-1. Provide as much information to the 9-1-1 dispatcher as possible.
2. Notification to all building occupants will begin immediately via intercom and will provide as much information that is needed to make informed decisions..
3. When possible, a staff member will stop any arriving staff or guests from entering the building or grounds.
4. When possible, and without putting anyone at risk, staff will assist guests, members and volunteers to exit the building or find a place to hide and barricade themselves.
5. Everyone should assess their own situation for the best survival options and proceed accordingly.

The recommended strategy for surviving an active shooter situation is:

1. **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.
2. **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.
3. **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 9-1-1 for police assistance. These buttons cannot be used for medical emergencies. Volunteers who work in locations with panic buttons will be trained on their use in the event of a public threat.

C. **Bomb Threat or Suspicious Package**

If SourcePoint receives a bomb threat:

1. The staff person in charge will alert building occupants via intercom.
2. The staff person in charge will immediately be in communication with law enforcement.
3. 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.
4. 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.

Procedures for Weather-Related Emergencies

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

1. 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.
2. 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.

3. The staff person in charge will make an announcement via intercom if relocation to safe areas is needed.
4. Staff will begin directing everyone to the lower-level hallways. Stay in the hallway area away from large open spaces.
5. Do not attempt to leave the building.
6. Do not use the elevators.
7. Stay away from glass windows and exterior doors that can be blown out or broken.

B. Tornado

Tornado Watch:

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

Tornado Warning:

1. A warning means that a dangerous weather event is imminent, and that immediate action must be taken to protect life and property.
2. If there is a tornado warning for Delaware County, the emergency siren located at the southwest corner of the facility will be activated.
3. Staff will begin directing everyone to the lower-level hallways; stay in the hallway area away from large open spaces.
4. For your safety do not attempt to leave the building.
5. For your safety do not use the elevators.
6. Stay away from glass windows and exterior doors that can be blown out or broken.
7. 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.
8. Get under heavy objects for protection.
9. Do not leave the safe area until instructed to do so by the staff person in charge or EMS responders.
10. The siren located on our property does not stay on until the warning has been lifted; it will recycle periodically during the warning.
11. **The staff person in charge must call 9-1-1** to find out if the warning has been lifted before instructing individuals to leave the safe area.
12. Volunteers should not leave the building until the staff person in charge receives authorization from the proper authorities.

Procedures for Infrastructure Emergencies

A. Fire

1. When the fire alarm sounds, the building must be evacuated immediately, without exceptions.
2. If a volunteer discovers a fire, he/she must 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.
3. Once the alarm is activated, the appropriate responding agencies are notified by our 3rd party alarm call center.
4. Use common sense. Do not attempt to extinguish the fire.
5. Do not use the elevator.
6. Follow the egress maps and evacuate as quickly and safely as possible.
7. If you become disoriented, stay low because smoke rises, and crawl along the floor looking for the light of a doorway or window.
8. 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.
9. 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.
10. 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.

NEWS MEDIA

The CEO is the only person 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 decline to provide any information.

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.mysourcepoint.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 Amelia Tucciarone. 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, Amelia Tucciarone at 740-363-6677.



Incident Report

Use one of the following forms 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.

Critical Incident Management		
Food Borne Illness Incident Report		
<p>In accordance with SourcePoint's Critical Incident Policy, use this form to report when a food borne illness is potentially connected to SourcePoint provided food. If possible, the report should be completed within 24 hours of the event. Submit completed reports to your direct supervisor for review. Supervisors submit report along with Leadership Incident Sign-Off to Director for review.</p>		
Information on Person(s) Impacted		
Were more than 2 people impacted? <input type="checkbox"/> Yes (attach list of names, contact information and role with SourcePoint of those impacted) <input type="checkbox"/> No (complete below for person impacted)		
Full Name:		
Home Address:		
<input type="checkbox"/> Employee <input type="checkbox"/> Volunteer <input type="checkbox"/> Member <input type="checkbox"/> Client <input type="checkbox"/> Guest <input type="checkbox"/> Other:		
Home Phone:	Cell:	Work:
Physician Name and Contact Information:		
Information on Incident (summary of details on back)		
Date & Time:	Employee:	Supervisor:
Suspected Food Item & Manufacturer's Product Information:		
Symptoms reported, including duration:		
Was medical treatment provided: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused		
If yes, explain what treatment and by who:		
Was EMS called? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, was person transported? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Required Notification(s)		
Consider: Health Department, law enforcement, vendors, contractors, NHS/HIPAA. Attach additional pages, as necessary.		
Notification to outside organization required:	<input type="checkbox"/> No <input type="checkbox"/> Yes (complete below)	
Organization Contacted:	Date of Contact:	
Name of person contacted & contact info: <i>Include summary of contact on back</i>		
Complete summary of incident on the back		
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Notes and follow-up information on reverse side of form.



Incident Report

Critical Incident Management

Foreign Object in Food Incident Report

In accordance with SourcePoint's Critical Incident Policy, use this form to report when a foreign object is reported in SourcePoint provided food. If possible, the report should be completed within 24 hours of the event. Submit completed reports to your direct supervisor for review. Supervisors submit report along with Leadership Incident Sign-Off to Director for review.

Information on Person Impacted		
Full Name:		
Home Address:		
<input type="checkbox"/> Employee <input type="checkbox"/> Volunteer <input type="checkbox"/> Member <input type="checkbox"/> Client <input type="checkbox"/> Guest <input type="checkbox"/> Other:		
Home Phone:	Cell:	Work:
Information on Incident (summary of details on back)		
Date & Time:	Employee:	Supervisor:
Food Item:		
Foreign Object Description:		
Manufacturer's Product Information:		
Was medical treatment provided: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused		
If yes, explain what treatment and by who:		
Was EMS called? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, was person transported? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Required Notification(s)		
<i>Consider: Health Department, law enforcement, vendors, contractors, HHS(HIPAA). Attach additional pages, as necessary.</i>		
Notification to outside organization required: <input type="checkbox"/> No <input type="checkbox"/> Yes (complete below)		
Organization Contacted:	Date of Contact:	
Name of person contacted & contact info: <i>Include summary of contact on back</i>		
Signature of Person Completing Report		
Signature:	Date:	

Complete summary of incident on the back

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



Incident Report

Critical Incident Management

Health & Well-Being Incident Report

In accordance with SourcePoint's Critical Incident Policy, use this form to report injury accidents, other injuries, medical situations, etc. If possible, the report should be completed within 24 hours of the event. Person completing report should enter facts of the situation as they know it. Submit completed reports to your direct supervisor for review. Supervisors submit report along with Leadership Incident Sign-Off to Director for review.

Information about Person Experiencing Health Incident		
Full Name:		
Home Address:		
<input type="checkbox"/> Employee <input type="checkbox"/> Volunteer <input type="checkbox"/> Member <input type="checkbox"/> Client <input type="checkbox"/> Guest <input type="checkbox"/> Other:		
Home Phone:	Cell:	Work:
Information about Witness Completing Report		
Role with SourcePoint: <input type="checkbox"/> Employee <input type="checkbox"/> Volunteer <input type="checkbox"/> Other:		
Name:	Signature:	
Summary of Incident (Provide details of incident on back)		
<u>Incident Type:</u> <input type="checkbox"/> Injury-Fall <input type="checkbox"/> Injury-other accident <input type="checkbox"/> Health/Medical Event <input type="checkbox"/> Illness <input type="checkbox"/> Other Health/Wellness:		
<u>Location of Incident:</u> <input type="checkbox"/> Client Home <input type="checkbox"/> South Office <input type="checkbox"/> Cheshire Rd.-Outside <input type="checkbox"/> Cheshire Rd.-Room: <input type="checkbox"/> Offsite Location: <input type="checkbox"/> Other:		
Any other witnesses to the incident: <input type="checkbox"/> Yes (list names and contact info below) <input type="checkbox"/> No		
Was medical treatment provided: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused		
If yes, what treatment and by who:		
Was EMS called? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown at time report completed		
If yes, was person transported? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown at time report completed		
Required Notification(s)		
<i>Consider: law enforcement, vendors, contractors, impacted parties, HHS(HIPAA). Attach additional pages, as necessary.</i>		
Notification to outside organization required: <input type="checkbox"/> No <input type="checkbox"/> Yes (complete below)		
Organization Contacted:	Date of Contact:	
Name of person contacted & contact info: <i>Include summary of contact on back</i>		

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



Incident Report

Critical Incident Management

Information Technology Incident Report

In accordance with SourcePoint's Critical Incident Policy, use this form to report incidents impacting SourcePoint's hardware, software and/or SourcePoint's Information & Technology policies. If possible, the report should be completed within 24 hours of the event. Submit completed reports to your direct supervisor for review. Supervisors submit report along with Incident Action Overview to Director for review.

Incident Type	
<input type="checkbox"/> Technical Policy Violation	<input type="checkbox"/> Unauthorized use of Technical Resources
<input type="checkbox"/> *Computer System Breach: <input type="checkbox"/> Internal <input type="checkbox"/> External	<input type="checkbox"/> HIPAA Violation of Information Systems <input type="checkbox"/> Privacy Breach

Severity of Incident		
<input type="checkbox"/> Severe	<input type="checkbox"/> Moderate	<input type="checkbox"/> Low
<ul style="list-style-type: none"> • Several customers affected • Economic loss • Material damage to creditability • Damage extends outside of Company/ Organization 	<ul style="list-style-type: none"> • Few customers affected • Some potential economic loss • Some material damage to creditability • Damage contained inside of Company/ Organization 	<ul style="list-style-type: none"> • Single or no customers affected • Minimal economic loss • Minimal damage to creditability • Some impedance but no damage to creditability

Incident Information	
Date & Time:	Location:
Name of Person Involved:	
Role with SourcePoint: <input type="checkbox"/> Employee <input type="checkbox"/> Volunteer <input type="checkbox"/> Other:	
Asset Tag Involved (if applicable):	Equipment involved (if applicable):

Required Notification(s)	
<i>Consider: law enforcement, vendors, contractors, impacted parties, HHS(HIPAA). Attach additional pages, as necessary.</i>	
Notification to outside organization required: <input type="checkbox"/> No <input type="checkbox"/> Yes (complete below)	
Organization Contacted:	Date of Contact:
Name of person contacted & contact info: <i>Include summary of contact on back</i>	

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



Incident Report

Critical Incident Management

Property Damage, Loss and Theft

In accordance with SourcePoint's Critical Incident Policy, use this form to report property damage, property loss, fiscal loss and theft connected to SourcePoint operations. If possible, the report should be completed within 24 hours of the event. Submit completed reports to your direct supervisor for review. Supervisors submit report along with Leadership Incident Sign-Off to Director for review.

Incident Type		
<input type="checkbox"/> Property Damage	<input type="checkbox"/> Property Loss (include SourcePoint equipment)	<input type="checkbox"/> Fiscal Incident (scams, credit card loss)
<input type="checkbox"/> Property Theft (include SourcePoint equipment) <input type="checkbox"/> Other:		

Information About Person Completing Report		
Role with SourcePoint:	<input type="checkbox"/> Employee	<input type="checkbox"/> Volunteer <input type="checkbox"/> Other:
Name:	Signature:	

Incident Information	
Date & Time:	Location:
Property Owner/ Impacted Party	<input type="checkbox"/> SourcePoint <input type="checkbox"/> Employee <input type="checkbox"/> Volunteer <input type="checkbox"/> Member <input type="checkbox"/> Client <input type="checkbox"/> Other:
Name of Owner/Impacted party (if not SourcePoint)	
Contact information:	
What was damaged/lost/stolen:	
Were there other witnesses to the incident: <input type="checkbox"/> Yes (list names and contact info below) <input type="checkbox"/> No	

Required Notification(s)	
<i>Consider: law enforcement, impacted parties, OSHA, legal counsel, etc. Attach additional pages, as necessary.</i>	
Notification to outside organization required: <input type="checkbox"/> No <input type="checkbox"/> Yes (complete below)	
Organization Contacted:	Date of Contact:
Name of person contacted & contact info: <i>Include summary of contact on back</i>	

For SourcePoint Staff Only (if report not completed by staff)	
Report received by:	Date:

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