

Flow Chart for Enhanced Protocol for Incident Review at Site

Step
1

- Local or District Coordinator observes an incident or gets report of an incident involving volunteer and/or taxpayer that requires completion of Incident Review Form with ENHANCED PROTOCOL
- Local or District Coordinator seeks advice of supervisor if necessary
- Local or District Coordinator completes sections 1-5 of Form with initial information.

Step
2

- Form (sections 1-5) is sent to supervisor within **1 business day** of incident or report.
- Supervisor forwards to SC **within 1 business day**; who promptly forwards simultaneously to RC and National Office. Notice should reach RC and National Office within 2 business days of occurrence. **SC should contact RC and National Office by phone if this schedule cannot be met and give verbal notice of incident.**
- Caption of email should give name of volunteer and/or taxpayer, date of incident and short description of incident (i.e. "vol conducts business at site")
- No further investigation is done at the local level unless/until directed by National Office and RC

Step
3

- National Office staff reviews and consults with OGC and/or other appropriate internal staff for direction and guidance as appropriate.
- National Office staff requests additional investigation and/or information from RC, SC or DC as necessary. As updated information becomes available, the form is updated showing the date and the name of the person updating the form.
- Resolution of issue is discussed by National Office staff and volunteer leaders as appropriate, and implemented.
- National Office staff completes review and documents final resolution of incident on form.