Flow Chart for Regular Protocol for Incident Review at Site

Step 1

- Local or District Coordinator observes or receives information regarding an incident involving volunteer and/or taxpayer that requires completion of Incident Review Form.
- Local or District Coordinator seeks advice of supervisor if necessary.
- Local or District Coordinator completes Sections 1-5 of Form with initial information. Fact-gathering continues, and form is updated as necessary, noting date and name of person making notes.

Step 2

- Form (Sections 1-5) is sent to supervisor via email within **1 business day** of incident (or knowledge of incident). Caption of email should give state,name of volunteer and/or taxpayer, and date of incident. (Example: CA2/Smith/4-1-11)
- Supervisor forwards to SC **within 1 business day**; who promptly forwards simultaneously to RC and National Office. Notice should reach the RC and National Office within 2 business days of the incident. **SC should contact RC and National Office by phone if this schedule cannot be met and give verbal notice of incident.**
- Supervisor assists with fact-gathering as appropriate, and provides advice regarding proposed resolution. Fact-gathering phase is completed **within 5 business days** unless there are extenuating circumstances**.**
- Form with proposed resolution is sent to SC **within five additional business days**, who reviews and forwards to RC and National Office.

Step 3

- RC and National Office review and provide advice to SC as appropriate for continuing review and proposed resolution (Section 8).
- SC reviews proposed resolution and notes approval on form. If not approved, then SC provides advice and guidance to the DC. Upon agreement SC sends final form to RC and National Office for permanent retention.
- National Office provides advice and guidance as necessary regarding the resolution of matter in order to provide continuity and equity across program.