

NorthWest Senior & Disability Services

Volunteer Handbook

2023





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WELCOME

Thank you for choosing to volunteer with us!

We are an awesome team of people who have come together with shared understanding and commitment to our mission, core values, and culture. My goal as your Executive Director is to remain dedicated to this commitment and continue to improve how our Agency delivers its services.

This Volunteer Handbook is designed to provide you with guidelines about the Agency, policies and general volunteer information. Your supervisor will provide you with details about your specific tasks, program and location. Be sure to ask questions and seek clarification whenever needed.

By volunteering your time, you make a positive difference in the lives of others. You help provide valuable services for our organization and programs that we could not otherwise provide. Above all, the people we serve come first. NorthWest Senior & Disability Services (NWSDS) is a human services agency designed for the purpose of improving the lives of those we serve. When we make decisions, our first consideration is the impact they will have on those we serve. This is why we ask that you read this handbook carefully and refer to it whenever questions arise.

We hope that your experience as an NWSDS volunteer is a fulfilling journey. Working together we do make a difference!

Again, thank you for your commitment.

Tanya DeHart

Executive Director

WHO TO CALL

- **Aging and Disability Resource Connection (ADRC):**
 - Toll free: 1-800-206-4799
 - Online: www.adrcoforegon.org
 - The ADRC offers information, referral, and assistance. There is no cost for this service. ADRC specialists take the time to learn about the needs in order to connect you or a community member to information, programs, or services that may be of help.
- **To report possible abuse, call:**
 - Adult Protective Services (in Clatsop, Marion, Polk, Tillamook, and Yamhill Counties): 1-800-846-9165
 - Oregon's Abuse Reporting Hotline (in other Oregon counties): 1-855-503-7233
 - Your Local Police Department (for help at any time)
- **NWSDS Human Resources:**
 - Local: 503-304-3400
 - Questions or reporting regarding the background check process, incident/accident reports, volunteer insurance coverage, and changes in your insurance coverage or your driver's license.
- **NorthWest Senior and Disability Services General Information (Clatsop, Marion, Polk, Tillamook, and Yamhill Counties)**
 - Front desk (Salem Office): 503-304-3400
 - Toll-free: 1-866-206-4799
 - Email: information.nwsds@nwsds.org
 - TTY: 711
 - Online: www.nwsds.org
 - Facebook: www.facebook.com/nwsds.org

OUR VISION

To be an innovative, nationally recognized leader.

OUR MISSION

Promote dignity, independence, and health; honor choice and empower people.

OUR CORE VALUES

Integrity

Working honestly, ethically, and being accountable.

Professionalism

Representing the Agency and ourselves with pride, expertise, and excellence.

Service

Responding promptly to customer and community needs.

Compassion

Showing concern and respect for the well-being of others.

Our mission and core values are
more than a poster on the wall!

ABOUT NWSDS

NorthWest Senior & Disability Services began as Mid-Willamette Valley Senior Services Agency on July 1, 1982. We are a local intergovernmental agency that first served the Marion, Polk and Yamhill counties and expanded in 2005 to include Clatsop and Tillamook counties, and services for people with disabilities.

As the designated Area Agency on Aging and Disability Services for Clatsop, Marion, Polk, Tillamook and Yamhill counties, NWSDS develops and maintains a comprehensive and coordinated service system to meet the needs of seniors and people with disabilities. Our approach to these responsibilities is reflected in the Agency's mission statement and core values.

NWSDS is governed by a Board of Directors, which is comprised of five county commissioners, one each from Clatsop, Marion, Polk, Tillamook and Yamhill counties. The Board relies heavily upon the recommendations and wisdom of board-appointed volunteers for the Senior Advisory Council and Disability Services Advisory Council.

NWSDS has been designated as an Aging and Disability Resource Connection (ADRC) serving as a single point of entry to services for seniors and people with disabilities in our five counties. We have offices located in Dallas, Salem, McMinnville, Tillamook, Warrenton and Woodburn, as well as numerous senior dining centers (meal sites) providing on-site dining, frozen meal programs and home-delivered meals.

The services coordinated and provided by NWSDS include, but are not limited to: information & assistance; case management; eligibility determination for Medicaid and SNAP (Food Stamp) programs; adult protective services; licensing of adult foster care homes; pre-nursing home admission assessments; home-delivered meals, peer mentoring, Senior Health Insurance Benefit Assistance (SHIBA), money management, and family caregiver support. Additionally, agency staff authorizes and arranges an assortment of long-term care supports including in-home services, respite care, adult day care, residential care, and nursing facility care.

WHO IS A VOLUNTEER?

Our volunteer members are people who donate approved services to NorthWest Senior & Disability Services without pay or other remuneration other than reimbursement of approved incidental expenses for those services rendered.

We have volunteers throughout the organization conducting a wide variety of tasks.

Some of our volunteer opportunities include:

- Delivering home delivered meals.
- Serving meals to consumers in community meal sites.
- Providing Senior Health Insurance Benefits Assistance (SHIBA).
- Helping other seniors cope with mild to moderate depression and/or anxiety through Senior Peer Mentors.
- Advocating and advising the agency and community as Advisory Council members on issues related to seniors and people with disabilities.
- Participating in group volunteer activities through a community or civic group.
- Providing bill-pay and rep-payee assistance through the Oregon Money Management Program.

Who is not a volunteer?

- Individuals who receive money for their services through wages, contracts or fee for services.
- Intern and practicum students receiving college credit.
- Individuals providing services through a job retraining program outside of employment.

RIGHTS AND RESPONSIBILITIES

As a Volunteer You Have the Right to:

- ✓ Feel positive about your experience
- ✓ Have support from others
- ✓ Receive a volunteer role description and suitable training
- ✓ Be heard
- ✓ Say “no” to requests that are outside of your comfort level
- ✓ Know about NWSDS
- ✓ Receive recognition

As a Volunteer You Have the Responsibility to:

- ✓ Honor the Agency’s Mission and Core Values
- ✓ Be honest
- ✓ Be reliable and dependable
- ✓ Be compassionate
- ✓ Keep information confidential
- ✓ Work as a member of a team
- ✓ Be open minded
- ✓ Report any safety concerns
- ✓ Be professional
- ✓ Be accountable
- ✓ Model good boundaries
- ✓ Be a mandatory reporter

GENERAL VOLUNTEER INFORMATION

VOLUNTEER SCREENING AND ONBOARDING PROCESS

To become a volunteer, you will need to complete a volunteer application packet, successfully pass an interview with a volunteer program supervisor, and attend orientation.

You MUST provide a valid email address and phone number when filling out an application.

To ensure the safety of our consumers, all volunteers will be subject to the Agency's full background check prior to volunteering.

VOLUNTEER TRAINING

Once the screening process is complete, and you meet the requirements of the volunteer position, you will go through training to prepare to work with consumers and staff. The training content and length will depend on the following criteria:

- The volunteer position and tasks.
- The experience and training you've had prior to becoming a volunteer.
- The program-specific needs of the consumers.

Meal Site volunteers will be trained at individual sites by the Nutrition Site Coordinator.

Training consists of some classroom training and on-site training depending upon the program.

As a volunteer at NorthWest Senior & Disability Services you will sign the Volunteer Handbook Acknowledgement Form found on page 35.

*All volunteers are required to complete mandatory trainings every year to stay in compliance with the Agency's guidelines.

BACKGROUND CHECKS

For new volunteers: Prospective NWSDS volunteers will be subject to the Agency's full background check prior to volunteering. You can begin your volunteer responsibilities

upon the approval of a background check. Background checks will include checks applicable to the position being offered such as reference checks, criminal checks as required under Oregon Statute, driving records, court records, abuse data bases, etc. Fingerprints may be required by the State of Oregon's Background Check Unit as part of the process. You will be notified of the results as required by regulations. If there is a denial, you should follow the appeal process specified in the denial notice.

The Agency makes the final determination following the completed background check and retains the right to revoke any offer of volunteer positions conditioned upon approval of a background check.

For current volunteers: Existing NWSDS volunteers will be subject to a new background check any time they volunteer with a different NWSDS program or become inactive. Some volunteer programs may require background checks of current volunteers on a more frequent basis.

All volunteers are required to notify NWSDS human resources immediately of any arrest, charge, conviction, or if a claim of abuse is filed.

INACTIVE VOLUNTEERS

Volunteers become inactive when they have not fulfilled their program duties for more than 12 months. Specific programs may require volunteers to complete a new application packet and training upon their return.

NON-DISCRIMINATION

Just as we are committed to treating our consumers with respect and dignity, NWSDS is committed to fostering an environment that is characterized by respect and dignity. Therefore, discrimination is not consistent with our mission and values and will not be tolerated from anyone, including any manager, supervisor, co-worker, volunteer, consumer, vendor or other third party. Everyone is responsible for fostering a respectful environment and reporting discriminatory or harassing behavior.

All reported incidents will be investigated. Complaints and actions taken to resolve complaints will be handled as confidentially as possible, given NWSDS' obligation to investigate and act upon reports of such harassment. Retaliation of any kind against the reporter of a suspected incident is prohibited.

HARASSMENT

NWSDS has a zero-tolerance harassment policy. Under this policy, harassment is defined as verbal, written or physical conduct that denigrates or shows hostility or aversion toward an individual due to one's race, color, religion, sex, sexual orientation, gender identity or expression, national origin, age, disability, marital status, citizenship, or any other characteristic protected by law.

Forms of harassment include:

- Improper or offensive visual behavior, such as eye, hand or finger gestures, drawing, photos, comics, written jokes, etc.
- Improper or offensive verbal behavior, such as jokes, slurs, comments, cat calls, suggestive or insulting noises, etc.
- Improper or offensive written memos, letters, comics, jokes, etc.
- Unwelcome, improper physical contact, especially of an intimidating, sexual or violent nature.
- Unwelcome advances, requests for dates, sexual favors, etc.
- Improper or offensive conduct is considered harassment when any of the following are true:
 - o Submission to such advances, requests or conduct is made either implicitly or explicitly a term or condition of an individual's employment;
 - o Submission to or rejection of such advances, requests or conduct is used as a basis for employment decisions affecting the individual; or
 - o Such advances, requests, or conduct have the purpose or effect of substantially interfering with an individual's work performance or creates an intimidating, hostile or offensive work environment.

Harassment is deliberate and/or repeated behavior that is not welcome, not asked for, and not returned.

Harassment is considered a form of volunteer misconduct and is therefore subject to disciplinary action appropriate to the findings.

GIFTS

Consumers may wish to show their gratitude by offering you small gifts or money. As a public agency there are significant restrictions on the acceptance of any gifts.

Due to the nature of the relationship, it will be important that you refrain from giving and receiving gifts from all consumers. It is important to keep this relationship professional and maintain healthy boundaries.

MANDATORY ABUSE REPORTING

As a volunteer, you are considered an agent of NorthWest Senior & Disability Service (NWSDS) and, therefore, are a mandatory reporter under the following Oregon Administrative Rule. Under Oregon Administrative Rule 411-020-0002 (20), all volunteers of Area Agencies on Aging (AAA), including NWSDS, are required to report suspected abuse of certain protected populations. Those protected populations include:

- Children under the age of 18
- Elderly, age 65 and over
- Adults with developmental disabilities
- Adults with mental illness
- Residents, of any age, in nursing facilities.

Volunteers are encouraged to report abuse of an adult, of any age, in other long-term care settings, such as:

- Adult Foster Homes
- Assisted Living Facilities
- Residential Care Facilities

Reportable abuse includes physical abuse, financial exploitation, sexual abuse, neglect, abandonment and verbal or emotional abuse. SB 760, approved in 2017, instructs all mandatory reporters report suspected abuse and neglect they encounter both while working/volunteering in their official capacity AND in their personal life for all vulnerable populations listed above.

Those reports may be made to either the local DHS or AAA office or to law enforcement. NWSDS volunteers who fail to report suspected abuse as required by law may face criminal or civil penalties for failure to report. Volunteers who are involved as the respondent in a charge or allegation of abuse must report it to their program supervisor.

ABUSE OF VULNERABLE ADULTS AND SELF-NEGLECT

In general, elder abuse is defined as referring to “any knowing, intentional, or negligent act by a caregiver or any other person that causes harm or a serious risk of harm to a vulnerable adult.” ¹

For purposes of this handbook, abuse is defined as:

- Physical Abuse – The use of physical force that may result in bodily injury, physical pain, or impairment; or any injury to an adult caused by other than accidental means.
- Neglect – Failure to provide basic care, or services necessary to maintain the health and safety of an adult.
- Abandonment – includes desertion or willful forsaking of an adult for any period of time by an individual who has assumed responsibility for providing care, when that desertion or forsaking results in harm or places the adult at risk of serious harm.
- Verbal or Emotional Abuse – includes threatening significant physical harm or threatening or causing significant emotional harm to an adult through the use of:
 - Derogatory or inappropriate names, insults, verbal assaults, profanity or ridicule; or
 - Harassment, coercion, threats, intimidation, humiliation, mental cruelty, or inappropriate sexual comments.
- Financial Exploitation – includes:
 - Wrongfully taking, by means including but not limited to, deceit, trickery, subterfuge, coercion, harassment, duress, fraud, or undue influence, the assets, funds, property, or medications belonging to or intended for the use of an adult;
 - Alarming an adult by conveying a threat to wrongfully take or appropriate money or property of the adult;
 - Misappropriating or misusing any money from any account held jointly or singly by an adult; or

- Failing to use income or assets of an adult for the benefit, support and maintenance of the adult.
- Sexual Abuse – includes:
 - Sexual contact with a non-consenting adult or with an adult considered incapable of consenting to sexual acts;
 - Verbal or physical harassment of a sexual nature;
 - Sexual exploitation of an adult;
 - Any sexual contact between a volunteer of a facility and an adult residing in the facility unless the two are spouses;
 - Any sexual contact that is achieved through force, trickery, threat, or coercion; or
 - An act that constitutes a crime under ORS 163.375, 163.405, 163.411, 163.415, 163.425, 163.427, 163.465, 163.467, or 163.525 except for incest due to marriage alone.
- Involuntary Seclusion – involuntary seclusion of an adult for the convenience of the caregiver or to discipline the adult.
- Wrongful Use of a Physical or Chemical Restraint – includes:
 - Situations where a licensed health professional has not conducted a thorough assessment before implementing a prescription for restraint;
 - Less restrictive alternatives have not been evaluated; or
 - The restraint is used for convenience or discipline.

Abuse of vulnerable adults can affect people of all ethnic backgrounds and social status and can affect both men and women.

If you know or suspect a person living in a long-term care facility is being subjected to abuse or neglect, as a mandatory reporter you are required to act. You must report to either the Adult Protective Services Unit for your local Area Agency on Agency or local law enforcement. The toll-free number for the Oregon Department of Human Services is 1-855-503-SAFE (7233), and the direct line for the **NWSDS Abuse Reporting Line is 1-800-846-9165**. If you have any questions, please contact your volunteer program supervisor.

CONFIDENTIALITY

"Confidentiality is the right of an individual to have personal, identifiable, and medical information kept private."² Volunteers are required to keep all communication and information confidential. Strict confidentiality is maintained for all financial and health

information and records. To keep confidential information private, you should follow these guidelines:

- Discussion regarding consumers will be held in locations that assure privacy.
- No privileged information about consumers or this Agency will be discussed with family and/or friends.
- Volunteer information shared within the context of group meetings, clinical sessions, and educational seminars will be held in strict confidence.
- Violation of confidentiality rules will result in immediate separation from the volunteer program.
- The only individuals allowed access to such information are agency staff who have professional need for the information.
- No communication and/or records will be disclosed to anyone outside the relationship with the consumer without prior written consent from him/her.

In the course of the services, we provide and the work we conduct, you and other volunteers are privy to confidential information. There are rules and regulations that govern the disclosure of such information. You will receive training on how to deal with confidential information, requests for and dealing with accidental disclosure.

TRANSPORTATION OF CONSUMERS

As a volunteer, you may assist in locating appropriate public or private transportation by providing the ADRC phone number **1-800-206-4799** to consumers who are in need of assistance.

Under no circumstance should you transport a consumer in your personal vehicle.

EMAIL, ELECTRONIC COMMUNICATION, AND TEXTING

Email, texting and other electronic communication methods that include protected health information must be secured or password protected/encrypted. NorthWest Senior & Disability Services has a secure emailing system that is to be used anytime protected health information (see page 22) is communicated with the Agency about the consumer. Texting is also not protected and therefore should not be used regarding consumers' confidential information (see Confidentiality, page 12).

In certain circumstances, when requested and authorized by the consumer, communication via texting can be allowed. Please speak with your program supervisor if this is appropriate for your specific program area and regarding what steps must be taken prior to utilizing this type of communication. For more information about NWSDS' information technology systems refer to Appendix C on page 26.

PERSONAL APPEARANCE

Maintaining a professional appearance is part of our core value of Professionalism. Part of our professionalism is interpreted by the impression we present to our consumers and others in our appearance. Consumers must be comfortable with us and trust us. A clean, neat, professional appearance helps to facilitate a level of trust and competence.

CONFLICT OF INTEREST

As an NWSDS volunteer and in the conduct of your duties with the Agency, you may not engage in any business transaction, have a direct or indirect financial, or other personal interest which would constitute a conflict of interest for the Agency. This includes some activity that may be conducted or include the interests of a relative, member of your household or close associate.

At no time can your NWSDS volunteer position be used to secure a benefit or avoid a detriment for staff, relatives, and members of your household or close associates in any way that would not also be available to any other individual served by NWSDS.

Additionally, resources of the Agency, such as supplies, equipment and time, are to be used for Agency or Agency sanctioned activities only. They are not available for personal use.

POLITICAL ACTIVITIES

As a NWSDS volunteer, you are not able to solicit any money, influence, service or other thing of value, or otherwise aid or promote any political committee, or the nomination or election of any person to public office while volunteering. However, nothing in this subsection is intended to restrict your right to express your personal political views or engage in political activity during your off time.

Within the Agency, some roles such as the board, advisory councils and identified employees will be engaged in advocacy and legislative activities on behalf of Agency

consumers within the scope of the NWSDS Mission. These individuals are to maintain a non-partisan stand when representing NWSDS.

USE OF POSITION FOR POLITICAL INFLUENCE

As a NWSDS volunteer, you should not promise any member of the public an appointment to any Agency position, favorable treatment or the influence of his or her office or other favor or reward in return for partisan political activity on your behalf, or on behalf of any candidate or cause.

SUBSTANCE ABUSE/DRUG FREE ENVIRONMENTS

As a volunteer, you should report fit-for-duty and free of any adverse effects of alcohol, intoxicants or illegal drugs. It is a violation of this policy to be under the influence, use, possess, sell, trade, dispense and/or offer for sale alcohol, intoxicants or illegal drugs, or drug paraphernalia in any volunteer setting or while conducting Agency related business. Illegal drugs or paraphernalia will be turned over to appropriate law enforcement.

The Agency is required to abide by the Federal Drug Free Workplace Act of 1988. Marijuana use is still prohibited under this Act and therefore constitutes prohibited conduct as outlined in this policy.

Volunteers who are using and possessing prescribed medications must consult with their doctors about the medication's effect on their fitness for duty and their ability to volunteer safely and effectively, including any volunteer related driving. You will need to disclose any restrictions to your program supervisor (underlying medical conditions do not need to be disclosed).

NWSDS recognizes that alcohol and drug abuse and addiction are treatable illnesses, and that early intervention and support improve the success of rehabilitation. We encourage volunteers to seek help if they or a family member may have an addiction problem. Referrals and resources are available through the ADRC phone number:

1-800-206-4799.

Violations of this policy will result in immediate disciplinary action, up to and including immediate dismissal from the volunteer program. All information received by the organization through this policy is treated as confidential medical information.

IDENTIFICATION

We hope that you will be proud to be identified as a volunteer with our Agency. If you are provided with a name badge or your program requires a displaying a name badge, it must only be worn when conducting Agency related business and must be returned to your supervisor when your volunteer assignment ends.

ATTENDANCE

Volunteer attendance is important to the operation of the Agency and to the consumers it serves. Your supervisor will review the procedures to follow if you are unavailable at your scheduled time. You should provide as much advance notice as possible if you cannot be present on your scheduled day and time to ensure your responsibilities are covered by someone else.

Your supervisor will review program specific attendance policies and requirements.

CORRECTIVE ACTION

In appropriate situations, sometimes corrective action may need to be taken. Examples of corrective action include the requirement of additional training, re-assignment to a new volunteer position, suspension or dismissal from volunteer service.

Actions taken will typically begin with a verbal warning, followed with a written warning or suspension from volunteer duties. Should these actions fail to result in adequate correction or should the infraction be serious, you will be discharged from the program. Any or all of these steps may be skipped depending on the circumstances (see Dismissal of a Volunteer for further information).

RESIGNATION

As a volunteer, you may resign from your volunteer service with the Agency at any time. If you intend to resign, it is requested that you provide advance notice to your supervisor and projected last day of volunteer.

DISMISSAL OF A VOLUNTEER

We believe that all volunteers are a valuable asset to our organization. The Agency trusts that you do not intend to engage in improper conduct and when brought to your attention, you will make applicable corrections. Therefore, it is the policy of the Agency to provide discipline in a corrective, progressive and lawful manner. However,

each situation will be evaluated according to the circumstances involved and the action taken may vary based upon our determination of what is proper for the situation.

NWSDS reserves the right to end the volunteer relationship at any time. Any violation of Agency volunteer handbook policy or procedure can result in a separation of the volunteer from their assignment and consideration for future volunteering assignments. Dismissal of a volunteer is a serious consideration. Dismissal may take place if you are unreliable, irresponsible, disruptive, demonstrating inappropriate behavior or failing to adhere to the policies and procedures of this handbook and at the Agency's discretion.

ADDITIONAL POLICIES AND PROCEDURES

Specific programs have additional policies and procedures. Your supervisor will notify you of specific policies you need to be aware of for your volunteer opportunity.

As a volunteer, you will be provided with the Agency's approved safety practices when assigned new duties. If there is any question on the safe way to approach a task, ask your supervisor before undertaking the task.

GUARDING YOUR SAFETY

Volunteers should maintain their safety in all situations and should report safety concerns to their immediate supervisor. If at any time, the volunteer feels uncomfortable with any situation they are required to use their best judgement to get out of the situation. If the volunteer has any reservation about entering a home, they should decline.

FIRST AID KITS

Fully stocked First Aid Kits are maintained at every NWSDS service location. Signs are posted indicating locations. While kit supplies are checked regularly, please notify your supervisor should stock be low.

HOME VISIT SAFETY

As a volunteer, you are to not enter a consumer's home unless it has been outlined in your volunteer description and you have received appropriate training. For more information on home visit guidelines refer to Appendix D on page 32.

911 POLICE EMERGENCY:

In case of an emergency or distress, call 911 immediately. Follow dispatcher's instructions regarding staying on the phone. Identify yourself to the police officer responding to the scene and follow their instructions.

BE PREPARED TO REPORT THE FOLLOWING INFORMATION

- Type of incident reported (medical emergency, assault, theft, etc.).
- Time of occurrence (now, in the past 30 minutes, longer).
- Location (exactly where you are or where the incident occurred): address, side of street, landmarks, route to get to location.

WHAT TO OBSERVE IF POSSIBLE

- Individual: gender, age, height, weight, hair color and length, clothing (type and color), any distinguishing characteristics (limp, acne, etc.), weapon involved and type, if applicable.
- Vehicle: color, type, size, model, year, license plate number, condition, any distinguishing characteristics.

Please report all incidents, injuries, emergencies, or distress calls initiated to your supervisor immediately.

PROFESSIONAL BOUNDARIES AND BEHAVIORS

Maintaining professional boundaries are key. If you conduct home visits or work directly with consumers as part of your duties, you can prevent many safety issues by having solid boundaries at all times and by staying professional, confident, and calm even in an escalating situation. Remember to keep in mind the scope of practice outlined in your volunteer role description.

Do not provide any assistance outside the scope of your training. Do not assist a consumer with housekeeping, personal care, or any other type of need other than that covered by your duties. Always refer concerns to your supervisor and provide the ADRC phone number **1-800-206-4799** to consumers who are in need of additional assistance. For further information, see examples of good boundaries in Appendix E on page 33.

VOLUNTEER ACCIDENT PLAN

As a NWSDS volunteer, you are currently covered by a personal accident plan through Berkeley Indemnity. This plan is a secondary insurance that covers medical payments due to injuries from accidents while volunteering only. This plan has a maximum benefit amount of \$15,000 per incident for medical expenses, and up to \$5,000 for accidental death, dismemberment, loss of sight, speech, or hearing. Volunteers may request a copy of the accident policy from their volunteer supervisor. Events which have, or may have resulted in injury must be reported immediately to your supervisor, who will be responsible for assisting in the completion of an Incident Report to Human Resources. Every accident may not result in an insurance claim, but all accidents must be reported to your supervisor and documented on an Incident Report.

When it is known that an accident has caused injury requiring attention from a medical professional, an insurance claim form must also be submitted within 72 hours of the accident. This form must be completed to initiate a claim. You must complete the form, along with any additional requested information, and return to your program supervisor, who will forward to Human Resources. A member of Human Resources will complete the Agency portion of the claim form and submit it to the insurance company. If your program supervisor is unavailable, or is not able to provide the form, you should contact Human Resources. Timeliness is extremely important in this process.

VEHICLE USE

As a volunteer you may be driving while conducting your volunteer activities. This must be part of your approved duties. It is never appropriate to transport a consumer in your own personal vehicle. All drivers must be at least 18 years of age, possess a valid driver's license, and a current DMV check must be completed and approved before driving is allowed for official activities.

In some instances, an Agency vehicle may be available for use. This must be approved by the program supervisor, who will review policies, procedures and etiquette for Agency vehicle usage.

If you are utilizing your own vehicle for your volunteer activities you must possess valid and current auto coverage that includes driving as a volunteer. NWSDS is not responsible for any physical damage to you or your vehicle. While driving your own vehicle, your insurance will be the only insurance coverage should you become involved in an accident. Before driving your private vehicle for agency business, volunteers must submit a completed Authorization to Use Private Vehicle form.

It is your responsibility to notify your program supervisor or Human Resources of changes in your insurance coverage or changes to your license.

Some volunteer positions have funds available for mileage reimbursement. Your supervisor will review this availability and expense reimbursement procedures with you.

IN THE EVENT OF A MOTOR VEHICLE ACCIDENT

1. Take necessary steps to protect the lives of yourself and others.

2. Comply with police instructions.
3. Follow the instructions provided by your policy holder, if driving your own vehicle. If driving a NWSDS vehicle the instruction for what to do in an accident is located in the glove box of the vehicle.
4. Do not assume or admit fault. Others will determine liability and negligence after a thorough investigation.
5. Report the accident to NWSDS as soon as possible.

APPENDIX A: HEALTH INSURANCE PORTABILITY & ACCOUNTABILITY ACT (HIPAA)

WHAT IS HIPAA?

HIPAA is the federal Health Insurance Portability and Accountability Act of 1996. The primary goal of the law is to improve efficiency and effectiveness of healthcare systems and protect the privacy of consumer's medical records and other health information.

HIPAA provides for the protection of individually identifiable health information that is transmitted or maintained in any form or medium. The privacy rules affect the day-to-day business operations of all organizations that provide medical care and maintain personal health information.

WHAT HEALTH INFORMATION IS PROTECTED?

"HIPAA protects an individual's health information and their demographic information. This is called '*protected health information*' or 'PHI.' This includes information that, even without the consumer's name, can identify who a person is. The PHI can relate to past, present or future physical or mental health of the individual; describe a disease, diagnosis, procedure, prognosis, or condition of the individual and can exist in any medium – files, voice mail, email, fax, or verbal communications. HIPAA defines information as protected health information if it contains the following information about the consumer:

- Names
- Dates relating to a consumer, i.e., birthdates, dates of medical treatment, admission and discharge dates, and dates of death
- Telephone numbers, addresses (including city, county, or zip code) fax numbers and other contact information
- Social Security numbers
- Medical records numbers
- Photographs
- Finger and voice prints
- Any other unique identifying number"³

SECURE BAGS

Due to the sensitivity of the information regarding consumers, Senior Peer Mentors and Oregon Money Management Program (OMMP) volunteers will be provided with a

secure transportation bag. Secured bags are designed to ensure that all confidential information will be protected during transportation and while in possession of protected health information.

OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION (OSHA) COMPLIANCE

CHEMICALS

All volunteers have a right to know what chemicals they work with, what the hazards are and how to handle them safely. *Safety Data Sheets* (SDS) are documents provided by the supplier of a chemical. General rules for handling chemicals in a meal site environment are:

- Read all label warnings and instructions.
- Follow instructions regarding quantity.
- Minimize contact with chemicals; use gloves.
- Always wash your hands after handling chemicals.
- If a chemical enters your eyes immediately hold open the injured eye and rinse with cold water for 15 minutes.
- Never store cleaning supplies with food items.
- Never mix cleaning supplies.
- Fire Prevention:
 - No candles, open flames are allowed in the meal site, or in Agency buildings.

ELECTRICAL SAFETY

- Keep electrical cords out of areas where they can trip people, where they can get wet.
- Turn electrical appliances off with the switch; do not pull out the cord.
- Turn all appliances off when leaving for the day.
- Never run cords under the rugs or other floor coverings.
- Report electrical problems immediately.

LIFTING

- Plan the move; make sure you have an unobstructed pathway.

- Test the weight, push, pull, “heft” the object. Generally, do not lift anything over 20 pounds.
- If assistance is needed, arrange for this before you start to move the object.
- Face the load and bend at the knees. If two people are needed for lifting they should be facing each other and bending at the knees.
- Lift objects from the floor to a bench or table, then lift to higher shelf as needed.
- If a turn is needed pivot your feet and move your whole body.

LADDERS AND STEPLADDERS

- Do not use ladders or stepladders. If you need something on a high shelf let the nutrition site coordinator know.

FOOD SERVICE SAFETY

- Unplug electrical appliances such as blenders, grinders, coffee pots from their power source before cleaning them.
- Wear closed-toe, low heel, non-slip shoes that have rubber soles while you are at work.
- Do not store cleaning products along with food products.
- Store cleaning equipment such as brooms, mops, carts and pails along with cleaning supplies in a utility area.
- When handling knife blades and other sharp cutting tools, direct sharp points and edges away from you.
- Cut in the direction away from your body.
- Do not use knives that are broken or have loose handles.
- Do not use knives as screwdrivers, pry bars, can openers or ice picks.
- Do not pick up knives by their blades.
- Carry knives with the tips pointed to the floor.

APPENDIX C: NWSDS' INFORMATION TECHNOLOGY SYSTEMS POLICY

Revised 7-1-21

NorthWest Senior & Disability Services (NWSDS) provides information technology tools for use by volunteers to assist them in carrying out their duties in fulfillment of the Agency's mission and values. All technology tools are owned or contracted by NWSDS and are public property, including all computer systems and peripherals, e-mail systems, software, network resources, Internet resources, voice mail, e-mail and the information stored on such tools.

The objective of this policy is to establish the policies and procedures governing the use of NWSDS' information technology systems, access to the systems and the information and data stored within these systems. This policy applies to all who have direct access or remote access to the systems, and includes volunteers, temporary help, vendors, and other authorized users.

NWSDS volunteers shall make use of technology equipment including all computers, computer-related peripherals and associated software in a legal and ethical manner consistent with government statutes, state ethics laws, rules, policies and regulations.

Volunteers should not expect privacy with respect to any of their activities using NWSDS provided means of communication, such as, but not limited to, phones, e-mail, instant messaging, video and web conferencing, Internet, Agency network or computer access or services. Users should remember that such communications may be subject to a variety of public disclosure laws. This includes the use of NWSDS' Wi-Fi services.

Computer Hardware

Computers are not to be moved from assigned locations without the authorization of Information Technology Services (IT).

The use of any flash/portable and USB types of media must be approved and/or provided by IT prior to use.

Computer Software

NWSDS owned software shall not be copied for personal use. Software shall be used in accordance with the software license. NWSDS owned software is the only software that can be installed on Agency equipment, unless approved by IT. Due to the risk of system contamination, only software and removable media (Flash/portable drives, USB sticks, smartphones, etc.) owned by NWSDS shall be used on Agency computers. If data needs to be transmitted from media received from another entity, the media must first be scanned using anti-virus software.

Transfer of files and information on removable media from personal computers/smart phones/USB/Flash Drives/Portable drives require authorization from IT. Graphic files, wallpaper and screensavers (if used), should be of an ethical manner, consistent with government statutes, state ethics laws, rules, policies and regulations.

Care of Equipment

All volunteers are expected to care for equipment they are using in the course of their work. Due to the portability of laptop computers and projectors, special care must be taken by staff using this equipment. If equipment is taken out of the office for use, the equipment is not to be left in a vehicle or unattended area. The equipment is also not to be exposed to temperature extremes.

When not in use, laptop computers and projectors are to be kept in acceptable storage. Laptops should be transported to and from the Agency in appropriate laptop cases.

Guidelines

To help volunteers get the most out of their phone, e-mail, video-conferencing, Internet, Agency network, Wi-Fi and Agency computer privileges, NWSDS has put together the following guidelines:

- Do not expect privacy and observe good security practices. You should never assume that any information you send or receive over the Internet is private. Be aware that there are a variety of ways communication can be disclosed to people other than the intended recipient. Personal use of the Agency's communication technology is at the volunteer's own risk, which includes recorded phone lines, email and using the internet to check personal banking accounts.
- Always represent NWSDS' best interests. Whenever you are logged into the network, you must avoid any communications or activities that could be construed as improper or that otherwise could harm NWSDS' reputation.
- Respect the privacy and property rights of others. Do not copy or distribute any copyrighted material you find on the Internet. It is always wise to treat all material as copyrighted, unless the author has given their permission for the material to be redistributed.
- Volunteers are expected to use the Agency's main phone system as the primary means for conducting Agency business over the phone. Agency-provided cell phones should be used when it's necessary to make contact while in the field, or in the event the Agency's main phone system is temporarily not functioning.
- Personal cell phones may only be used to carry out agency business that cannot wait until the primary and agency-provided means of communication is available. The Agency may request a copy of the cell phone bill statement with business-related calls in question. Please refer to the Agency's Cell Phone Use Policy for more information.
- When using web-conferencing applications such as Zoom or MS Teams for individual and group meetings, volunteers must have a clean, work-appropriate, distraction-free background for all meetings that involve consumers, outside entities, or members of the public. More personalized virtual backgrounds approved by management may be used for internal meetings with agency staff or agency meetings. Volunteers are expected to practice good meeting etiquette.

When using web-conferencing applications for individual and group meetings, volunteers are expected to turn on their camera, unless otherwise approved.

- Use NWSDS communication systems responsibly. Volunteers should not use the NWSDS e-mail or instant messaging system for general distributions to all agency employees without authorization from their supervisor.
- Volunteers requiring remote access to the Agency's network, Internet or e-mail services from any off-premise computer system must be authorized by their supervisor. Off-premise computer systems must follow protocols established by IT when connecting to the Agency's network.
- Be sure to notify IT of problems you may encounter, such as problems with filters limiting your access to sites critical in conducting your work, inappropriate sites showing up on your favorites lists or through legitimate work-related searches, excessive spam, or what may appear to be breaches of security.

Personal Use

The Agency recognizes that volunteers occasionally have a need to talk to family members, confer with children's schools and take care of other matters during breaks or lunch and that use of the technology tools provided may be more efficient for volunteers and the Agency. Examples may include sending a quick e-mail or making a local telephone call. When making personal calls using the Agency's phone system, volunteer must keep in mind that all calls are recorded, and as such, become public record, subject to public records disclosure laws. Such use must be ***brief, infrequent, and in compliance*** with this policy and must not interfere with the productivity at the Agency, nor consume or adversely impact system resources. No long-distance calls are to be made that result in a cost to the Agency. Instead, personal long-distance calls are to be made using personal cell phone or calling card.

Use of Wi-Fi

Staff and Partners are able to access our Wi-Fi network utilizing appropriate passwords. Consumers are not authorized access to our Wi-Fi networks at this time due to security issues. Wireless access utilizes a portion of bandwidth from our network. Therefore, the volume of business traffic on our network dictates the speed, fast or slow, of the Wi-Fi. The connection is available to use during breaks or throughout the day on your

personal devices. The use of NWSDS' Wi-Fi is acceptable presuming that any personal use follows the information technology policy regarding ethics laws and rules. For example, streaming of music during working hours is an acceptable use of the Wi-Fi as it does not take away from productivity. Streaming videos, social pages and surfing of the web on personal devices can be done on breaks and lunches but must meet the guidelines of this policy. The Wi-Fi is provided as is without warranties of any kind, either expressed or implied.

Policy Violations

The following are examples of violation of this policy for anyone using the Agency's Information Technology Systems. This list is not all inclusive of actions which may violate this policy. Wi-Fi is a part of the Information Technology Systems.

- Using Agency computers or any agency provided computer service in a manner conflicting with the Agency's Professionalism in our Work policy, and as prohibited by ORS 244.040(1);
- Accessing, sending, soliciting, receiving, printing or storing offensive, pornographic, obscene, or defamatory material;
- Distributing or storing chain letters, jokes, solicitations, junk mail, offers to buy or sell goods, or other non-business material of a trivial or frivolous nature;
- At any time visiting or conducting any personal shopping on-line;
- With the exception of Wi-Fi, the visiting or participating in Instant Messaging or chat rooms other than Spark Instant Message that are not work related (this includes social networking sites such as Facebook, Instagram, Twitter; etc.);
- Visiting, or participating in, any gaming or gambling sites;
- Purchasing, acquiring or installing software or hardware without prior authorization from IT.

Those who violate this policy are subject to discipline, up to and including immediate termination. Furthermore, volunteers using NWSDS' technology system for defamatory, illegal, or fraudulent purposes also may be subject to civil liability and criminal prosecution. Volunteers who use the system in violation of this policy and incur any fines, penalties or other costs, will be personally liable for such damages, as

well as face disciplinary action. Questions regarding this policy should be addressed to your supervisor or Human Resource.

APPENDIX D: HOME VISIT SAFETY GUIDELINES

The following excerpts have been adopted from Oregon Health Authority's 2014 "Home Visitor Safety Guide"⁵ and are recommendations to consider when entering a consumer's home. Volunteers do not perform unexpected visits; all visits are planned ahead of time and require a consumer's approval. These guidelines are recommendations to ensure your safety and that of the person you serve. If you have any questions make sure to consult with your program supervisor.

BEFORE THE VISIT

Ensure that you have obtained as much information about your consumer as possible before the visit and make sure that all appropriate risk assessments are carried out:

- Contact the individual to confirm the appointment and ask questions about pets, children, other potential visitors, etc. Ask family to secure pets before arrival.
- Make sure you have the correct address and precise driving directions.
- If an upcoming home visit presents significant safety hazards, talk with your supervisor before you make the visit.
- Take only the items necessary to perform your volunteer responsibilities.
- Conceal personal items in the trunk of your car before leaving the office so you are not observed placing items in your trunk.
- Carry a cellphone with you, if possible.
- Adhere to current Agency health policy when going into home.

TRUST YOUR INSTINCTS

If at any point before or during a visit you feel that your safety may be compromised, listen to this feeling and do what you need to do. This could mean rescheduling the visit for another time, leaving in the middle of a visit with promises to call later, or moving the visit from the participant's home to a safer venue. This is the most important guideline of all! ⁵

APPENDIX E: EXAMPLES OF GOOD BOUNDARIES

- Be careful about how much you tell a consumer about yourself and personal information you share.
- Do not speculate about a medical diagnosis or give medical advice, administer medications or have other related interactions.
- Do not provide any assistance including, but not limited to, assisting a consumer with housekeeping, personal care, or any other type of need other than that covered in your volunteer training. Always refer concerns to your supervisor and provide the ADRC phone number **1-800-206-4799** to consumers who are in need of additional assistance.
- Share only the contact information necessary to do your volunteer duties; do not share personal email, home address, or phone numbers you do not use for volunteer purposes.
- Do not get into a consumer's car and do not allow a consumer to get into your car.
- Do not loan or give money to a consumer; do not borrow or take money from a consumer.
- Do not purchase or sell anything to a consumer.
- Do not accept food or any other type of gifts.
- Be aware of cultural differences that may exist in a consumer's home.

Attention to your behavior and attitudes can improve safety – and strengthen your relationship with consumers and their loved ones. It is a good idea to act or react in the following ways:

- | | |
|-----------------|-----------------|
| • Business-like | • In control |
| • Professional | • Kind |
| • Calm | • Respectful |
| • Confident | • Compassionate |

Treating consumers with respect protects their dignity. If a consumer feels threatened, they may become upset, aggressive or defensive. Remember you are a guest in someone else's home. ⁶

VOLUNTEER ACKNOWLEDGEMENT FORM

Thank you for offering to volunteer at NorthWest Senior & Disability Services. As a volunteer you have been provided with information about your volunteer work; this information includes policies and procedures that help ensure the appropriate delivery of services, volunteering within your scope of practice, and the safety and well-being of consumers. Should you have any questions or need clarification ask your supervisor.

NWSDS is firmly committed to providing a safe environment. Be sure that you have read and understood the Volunteer Handbook's procedures and policies and understood how and when to report unsafe conditions, accidents, illness, etc.

By signing this acknowledgement form you certify that you:

- Understand not all situations can be prevented and that there is always a risk of injury.
- Assume full responsibility for your own safety, holding NWSDS, associated board, managers and employees harmless from any claims that may arise from or in connection with your volunteer service.
- Understand and agree with your roles and responsibilities as a volunteer for NWSDS as outlined in the Volunteer Handbook.
- Have read and understood the Vehicle Use Policy found on page 20 of the Volunteer Handbook.
- Understand that you are covered by a personal accident plan while performing your assigned volunteer duties. This plan has a maximum benefit amount of \$15,000 per incident for medical expenses, and up to \$5,000 for accidental death, dismemberment, loss of sight, speech, or hearing.
- If you are unable to complete the tasks for which you have volunteered, or are unable to follow the policies and procedures in place, you may be asked to fill a different volunteer role or no longer volunteer.
- Are required to notify NWSDS human resources immediately of any arrest, charge, conviction, or if a claim of abuse is filed.

Your signature confirms that you have received a copy of the Volunteer Handbook, have received an orientation by the Agency and understand your roles and responsibilities as a volunteer for NWSDS as outlined in this acknowledgement and in the Volunteer Handbook.

Volunteer Name (please print)

Volunteer Program Name

Volunteer Signature

Date

SOURCES

1. US Department of Health and Human Services. Frequently Asked Questions. How can I recognize Elder Abuse? <http://www.hhs.gov/answers/programs-families-children/prevent-abuse/recognize-elder-abuse.html>.
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4. HIPAA: Health Insurance Portability Accountability Act. Tennessee Department of Health. <http://tn.gov/health/topic/hipaa>.
5. Oregon Health Authority. Oregon's Home Visitor Safety Guide. (May 2014) [https://ncwwi.org/files/Incentives Work Conditions/home-visiting-safety-guide.pdf](https://ncwwi.org/files/Incentives_Work_Conditions/home-visiting-safety-guide.pdf)
6. Texas Health and Human Services Commission. Safety Tips for Home Visitors: Texas Home Visiting Program. Oregon's Home Visitor Safety Guide. (Aug 2012) <http://www.texashomevisiting.org/wp-content/uploads/2015/06/Safety-Guidelines-for-Home-Visitors.pdf>