



## **9.05 Handling Incoming Information and Requests**

Approved: 2018-03-08

Latest Revision Date: yyyy-mm-dd

Review required: 2022

### **Intent**

To describe handling of letters, emails, phone calls and any other incoming communications.

### **Policy and Procedures**

Requests and submissions come to SBOA in various forms and to various people. They can be internal or external, significant or routine, To assure timely responses, suitable distribution and appropriate handling, recipients of requests and submissions are expected to follow guidelines for handling incoming communications.

Recipients are expected to:

- recognize the communication is appropriately assigned to them, or
- redirect to another Director, or
- send to the President and Secretary for assignment or circulation.

Once assigned, recipients are expected to determine appropriate handling as suggested below. Sometimes incoming communications require unique handling that is not captured in the table.

All communication about significant matters (having great meaning or consequence or lasting effect) must be copied to the Secretary, who will log incoming communications and responses (if any), and must be filed in Permanent File Storage (see [9.01 Records Control and Security](#)).

The attached form may be used to indicate classification and handling.

### **Application**

Any SBOA member who receives communications directed at SBOA, and the Executive Secretary.

### **Notes**

Based on information from online sources.

From/Format: \_\_\_\_\_

Assign to: \_\_\_\_\_

Distribute to: \_\_\_\_\_

(select all that apply)

- |  |  |  |   |                                 |
|--|--|--|---|---------------------------------|
| <input type="radio"/> significant (having great meaning or consequence or lasting effect)          | <input type="radio"/> for response     | <input type="radio"/> time sensitive     | <input type="radio"/> about member            | <input type="radio"/> inquiry   |
| <input type="radio"/> operational (things that are done regularly to keep Association functioning) | <input type="radio"/> for action       | <input type="radio"/> not time sensitive | <input type="radio"/> from member             | <input type="radio"/> complaint |
| <input type="radio"/> trivial (unimportant, not consequential)                                     | <input type="radio"/> for information  |  | <input type="radio"/> part of member's record |                                 |
|  | <input type="radio"/> for distribution |  | <input type="radio"/> private                 |                                 |
|  | <input type="radio"/> for filing       |  | (confidential)                                |                                 |
|  | <input type="radio"/> for deletion     |  |   |                                 |

other \_\_\_\_\_