



F05 CONFIGURED SUPPORTING DOCUMENT

Community Contact Sheet

A controlled, editable working derivative for M-T1-CP-16-SD-02.
Complete local facts, approvals and operational evidence before
use.

Release truth. This file is configured for substantive review. It is not approved for public distribution or operational use. Local law, insurance, safeguarding, accessibility, privacy, brand, rights and accountable-owner checks remain mandatory.

Release control

Field	Controlled value
Status	REVIEW — restricted overlay; privacy, service-boundary and referral approval required before collection
Supporting-document code	M-T1-CP-16-SD-02
Exact derivative title	Community Contact Sheet
Source initiative	M-T1-CP-16 - Rotary Community Help Desk
Source initiative code	M-T1-CP-16
Source initiative title	Rotary Community Help Desk
Initiative disposition	Absorbed as restricted overlay
Canonical parent	M-T1-CP-14 - Pop-Up Rotary Activation System
Canonical parent code and title	M-T1-CP-14 - Pop-Up Rotary Activation System
Named overlay or migration label	Scoped Information and Referral Desk
Redirect or tombstone route	Permanent restricted-overlay alias from M-T1-CP-16 to M-T1-CP-14; retain M-T1-CP-16-SD-02 as the stable asset code and require the approved service-boundary/referral route
Family master	Playbook_F05_Registration_Contact_Tracking_Master.md
Family / master version	F05 / 1.0
Recorded master SHA-256	1d4fc47ca320db79141cefabddea504db96e871c731ad7e210086b0e0680a5cd
Authoritative index	Playbook_Supporting_Documents_Master_Index.md v1.1
Configured master variant	Section 18 — M-T1-CP-16-SD-02 Community Contact Sheet overlay
Derivative version	v0.1

Adaptation note

Use only for the Scoped Information and Referral Desk restricted overlay under the Pop-Up Rotary Activation System. Publish the desk's scope and explain that it is an information/referral point, not a confidential professional advisory or case-management service. Capture a topic category and concise requested outcome; collect name/contact only when follow-up is requested. Obtain explicit agreement before an identified referral and transfer only the approved minimum facts.

Instructions

1. Approve the desk scope, service-boundary script, emergency route, specialist/safeguarding handoff and referral directory before opening.
2. Offer anonymous information wherever follow-up is unnecessary. Keep anonymous tally counts separate from identifiable records.
3. Use categories and a concise requested action; stop and redirect if a person begins disclosing unnecessary sensitive detail.
4. Do not collect detailed health, family violence, financial, immigration, legal, housing-crisis, criminal-history or safeguarding narratives; identity documents; evidence images; or information about another person.
5. If immediate danger is disclosed, use the approved emergency process. Transfer safeguarding/specialist concerns through the authorised restricted route, leaving only minimal transfer facts in F05.
6. Verify the receiving person/service, explain the handoff, obtain agreement and record acceptance before marking a referral complete.
7. Close the F05 record when information is supplied or referral ownership is accepted. Do not operate an informal case file.

Controlled configuration fields

Field	Completion instruction	Evidence
{{ACCOUNTABLE_ENTITY}}	Enter the club or District unit operating the desk.	Initiative approval
{{DESK_NAME}}	Enter the approved public name for the Scoped Information and Referral Desk.	Overlay approval
{{APPROVED_SCOPE}}	List the information categories and actions the desk may provide.	Service-boundary approval

Field	Completion instruction	Evidence
{{OUT_OF_SCOPE}}	State the professional, crisis, advisory and case-management services the desk does not provide.	Governance/risk review
{{TOPIC_CATEGORIES}}	Insert the approved neutral routing categories.	Referral workflow
{{EMERGENCY_ROUTE}}	Enter the locally approved immediate-danger process and staff action; do not improvise.	Emergency/safety approval
{{SPECIALIST_HANDOFF_ROUTE}}	Enter the authorised restricted path for safeguarding or specialist concerns.	Safeguarding/privacy approval
{{REFERRAL_DIRECTORY_VERSION}}	Enter the verified service-directory version and review date.	Referral directory control
{{NOTICE_VERSION}} / {{PRIVACY_URL}} / {{PRIVACY_CONTACT}}	Enter approved notice, privacy information and correction/concern routes.	Privacy review
{{FOLLOW_UP_OWNER}} / {{FOLLOW_UP_TARGET}}	Enter the owner and target for ordinary information requests.	Service-level approval
{{RETENTION_TRIGGER}}	Enter the close/review/disposal trigger for identifiable contact records.	Retention schedule

Controlled public fields

Public field	Required only when	Control
Topic category	Every information/referral request	Use neutral categories; no diagnosis/inference
Requested outcome	An action is requested	One concise action, not an open case narrative
Preferred name	Personal follow-up is requested	Exclude for anonymous information/tally
One contact route	Follow-up is requested	Collect only the selected channel
Preferred contact time or access arrangement	Needed to complete the response	Ask for the arrangement, not diagnosis
Identified referral choice	Desk cannot respond directly and a verified referral is proposed	Name recipient/category, fields transferred and purpose; explicit agreement required
Notice acknowledgement/date	Personal information is collected	Record notice version and method

Configured community contact sheet

{{DESK_NAME}}

Supporting-document code: M-T1-CP-16-SD-02 **Referral directory:** {{REFERRAL_DIRECTORY_VERSION}} **Collection notice:** {{NOTICE_VERSION}}

What this desk can and cannot do

{{APPROVED_SCOPE}}

{{OUT_OF_SCOPE}}

This is an information and referral point. It is not a confidential professional advisory, emergency-response or case-management service. If immediate danger is disclosed, the team follows {{EMERGENCY_ROUTE}}.

Your request

Choose the closest topic: {{TOPIC_CATEGORIES}}

What outcome would be useful today? _____

Please state the information, contact or referral you want. Do not include detailed medical, legal, financial, family, immigration, safeguarding or incident information on this sheet.

Follow-up, only if requested

Preferred name: _____

Choose one contact route:

- ☐ Email: _____
- ☐ Mobile/SMS: _____
- ☐ Telephone call: _____
- ☐ No follow-up; information today is enough

Best contact time or communication/access arrangement, if needed:

Referral choice, only when an identified handoff is proposed

Proposed receiving service/person: Purpose of referral: Minimum fields to be transferred:

- ☐ I agree that the listed minimum information may be sent to the identified recipient for the stated purpose.
- ☐ I do not agree; please provide any available public contact information instead.

How we will use your information

{{ACCOUNTABLE_ENTITY}} will use the information you choose to provide to answer this request or complete the referral you agree to. Privacy information is at {{PRIVACY_URL}}. To correct information, withdraw an uncompleted referral or raise a concern, contact {{PRIVACY_CONTACT}}.

Acknowledgement: I have read or had explained this notice. Participant confirmation: Date:

Internal routing and referral record

Intake ID	Anonymous / identifiable	Topic	Requested action	Owner	Due date	Status	Referral ID	Recipient verified	Agreement recorded	Recipient accepted	Close date/reason
				{{FOLLOW_UP_OWNER}}	{{FOLLOW_UP_TARGET}}	New		Yes / No	Yes / No	Yes / No	

For a specialist/safeguarding transfer, record only the transfer identifier, authorised owner, time and acceptance in this table. Use {{SPECIALIST_HANDOFF_ROUTE}} for restricted details.

Boundary, referral and release checklist

- ☐ CP-16 is treated as the restricted Scoped Information and Referral Desk overlay under CP-14.
- ☐ Approved scope, exclusions and service-boundary script are visible to visitors and briefed to staff.
- ☐ Immediate-danger, safeguarding and specialist routes are current, tested and role-owned.
- ☐ Topic categories and requested-action prompts prevent open sensitive case narratives.
- ☐ Anonymous tally and identifiable follow-up records are separate.
- ☐ Referral directory version, recipient verification and review dates are current.
- ☐ Referral consent names the recipient/category, purpose and minimum fields; acceptance is recorded.
- ☐ No identity documents, evidence images, third-party details or specialist narratives enter FO5.
- ☐ Digital, private paper and assisted routes show the same notice and boundaries.
- ☐ Ordinary follow-up, overdue escalation, correction/withdrawal and closure work end to end.
- ☐ {{RETENTION_TRIGGER}} closes records after information is supplied or referral ownership is accepted.
- ☐ Staff understand that FO5 is not an ongoing case-management system.

Review record

Review domain	Reviewer	Outcome / required change	Date
Overlay, scope and service boundary			
Privacy and data minimisation			
Emergency and safeguarding routes			
Referral directory and secure handoff			
Accessibility and assisted capture			
Final approval			