

**Cottonwood, Inc.
Policies and Procedures**

SECTION: Consumer Related
SUBJECT: Case Record Review
EFFECTIVE DATE: January 1984

POLICY NO: 05-031
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Policy:

In the interest of maintaining consumer files to meet licensing requirements there will be a Case Record Review Process. The purpose of the process is to review case records and related policies and procedures in order to evaluate their adequacy and to propose improvements in the record keeping system.

Procedures:

1. The Case Record Review Process is a function of the Support Services Department. The Records Management Specialist facilitates the process. The reviews are completed by the Records Management Specialist, Director of Support Services, CEO, Executive Assistant, and representatives from each program area.
2. To measure adequacy and fulfillment of record keeping requirements, Case Record Reviews occur monthly to review a random sample of case records (two case records per caseload) with guidelines set out in policy 05-030.
3. Each case manager is responsible for correcting any deficits found through the review process.