



Policy & Procedure Manual

FILE FOLDERS - R-II-5

POLICY:

Each client will have a file folder to store non-current information that does not belong in the casebook (RR-II-1) or Individual Support Plan (R-I-6).

PURPOSE:

To have an accessible area to store valuable information which can be referred to.

PROCEDURE:

1. Each primary care coordinator will label a file folder with the client's name and put it into the filing cabinet in the client's home.
2. By the 10th of each month, coinciding with the Monthly Summary Report, the primary care coordinator will check the casebook and the Individual Support Plan to ensure they contain the required information as identified in the policies Casebook Filing Order (RR-II-1) and Individual Support Plan (R-I-6).
3. Other information that doesn't meet the criteria for the above stated policies but is still valuable as resource information should be in the client's file folder. These items include but are not limited to:
 - old meeting minutes/personal plans
 - scatter charts
 - baselines
 - non-current action plans
 - non-current guidelines
 - wheelchair assessments
 - other assessments

RECOMMENDED BY: Director, Personal Support Services

APPENDICES: 0

OPERATIONAL ACCOUNTABILITY: Administration, Personal Support Services
Administration, Personal Support Services

ORIGINAL POLICY DATE: July 2002

AUTHORIZED BY: Executive Director

SIGNATURE: _____