

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: PERSONS SERVED FILES AND RECORD OF EFFECTS**

**Applies to:** All Personnel, Volunteers, Persons Served, Families, Advocates and Caregivers

Original Effective Date: 1993

Effective Date: March 26, 2018

Replaces Procedure Dated: December 21, 2012

1. Prior to a person starting service or starting service in a new area, the Community Placement Developer-Intake:

- Gathers the information required by the policy and develops the person's binder and/or binders.
- Gives the completed binder(s) to the executive director or activity quality service manager who reviews it and gives it to the area supervisor or manager.

2. The area supervisor or manager:

- Thoroughly reviews the binder to ensure it contains all the required information.
- Orientates all staff to the content of the binder and their ShareVision site.
- Ensures the binder is accessible.
- Ensures information is current, correct and utilized.
- Ensures documents and information are filed in the correct section, in the correct order, with the most current information first and older documents or information behind.
- Ensure the documents referenced in the policy are uploaded and managed as outlined.
- Annually reviews the binder and files information as outlined in the policy.

3. The staff:

- Review and update the binder(s) of the individuals they worked with adhering to the Pathways Abilities Society policies and procedures that affect the binder intent, maintenance and content.
- Inform the supervisor if information is outdated, missing or completed.

4. An Individual receiving services, their family member or an authorized person wanting to review their binder, contacts the supervisor to arrange a time.