PATHWAYS ABILITIES SOCIETY

PROCEDURE: PERSONS SERVED FILES AND RECORD OF EFFECTS
Applies to: All Personnel, Volunteers, Persons Served, Families, Advocates and Caregivers

Effective/Revision Date:
1993
April 28, 2003
January 26, 2004
May 30, 2005
March 28, 2006
April 16, 2008
September 16, 2011
December 21, 2012
March 26, 2018

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- Inform the supervisor if information is outdated, missing or completed.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.