

Closed CSR Review Checklist

Consumer Name: _____ Reviewer: _____

Reason for Exit: Died Goal Met Moved Other Withdrew Date: _____

Coordinator: _____ Continue Mailing List? _____

Reviewer: Upon receipt of the closed consumer file from the coordinator:

_____ **When closing 1:1 consumers: Give “Step 7” survey to Deb or Marian; who will assign a lead coordinator to complete it. Write N/A if this is a consumer in a group, or is a nursing home, Attendant Referral, Sports/Recreation, DMD or a Transitional Housing Consumer. Program specific satisfaction surveys are given to these consumers.**

1. Review Database: check when applicable information contained within the following areas is correct and accurate or give short explanation *why not*: *Circle One*

- | | |
|------------------|---|
| Yes or No | Consumer Information Page— <i>Exit information</i> completed |
| Yes or No | Consumer Disability and Language information complete |
| Yes or No | Request for Services- <i>Services Requested & Living Situations</i> complete |
| Yes or No | Programs and Funding complete |
| Yes or No | Goal in database matches the goal written by consumer; closure dates completed, outcome result has been selected. |
| Yes or No or N/A | Contact Log contains entries for intake, assessment, closure and goal successful and unsuccessful as well as entries for timely meetings with the consumer, which reflect work accomplished on the 1:1 consumer goal . |
| Yes or No or N/A | Contact Log contains entries for intake, assessment, closure and goal successful and unsuccessful as well as entries for timely meetings with the consumer group entries are entered, correct and reflect work accomplished on the group consumer goal . |
| Yes or No or N/A | Return any CSR's to Deb or Marian with a list of errors (in the CSR or in the database); they will review and correct with the coordinator, then return the CSR to the program assistants. |

2. Review of the Closed Consumer Case File, as applicable, remembering to check for Consumer and Witness Signatures, make sure forms are dated or give short explanation of *why signatures or dates are not given*:

- | | |
|-----------|---|
| Yes or No | Consumer Profile printed and in place |
| Yes or No | Goal and/or Goal Summary is printed and in place |

- Yes or No Eligibility Determination & Accommodation Checklist
- Yes or No Written/original Goal(s) (Step 3C) or Waiver (Step D). Consumer has determined: successful or unsuccessful.
- Yes or No or N/A Authorization to Request or Release Confidential Records and Information (Step 4A)
- Yes or No
Accept/Decline Authorization For Publicity (Step 4B)
(DMD/Sp/Rec)
- Yes or No
Accept/Decline Authorization for use of Case File in a State, Federal or QUILS Review
(Step 4C)
- Yes or No
DMD/SP/Rec Signed--ILS Program Information Packet Checklist (Step 5)
- Yes or No or N/A Copy of Closure Letter in the CSR (not needed for group participants)

3. Check that the following forms have been completed:

- Yes or No Assessment completed
- Yes or No Flow Chart completed
- Yes or No **Checklist Complete**
- Yes or No or N/A Employment documentation criteria has been met

4. Step 7

Yes or No or N/A Upon return of **Step 7 from Deb or Marian**, place in the consumer's file, on the left side, on top of the **Flow Chart**. ***This step does not apply to group participants.***

In the Volunteer Mailing Database:

- Yes or No or N/A Change/Update **Consumer's address** if needed
- Yes or No or N/A Remove from the **Consumer Mail Group**
- Yes or No or N/A Delete this consumer from the **Volunteer Database**, if they no longer want to receive **First Look or Advocacy Action News**. If they are on other mailing lists, don't delete them.

5. Finished at last! Place this form on top of the Flow Chart on the left side of the CSR.

When all is well with the world, place the CSR in the closed consumer file cabinet. Ya Hoo!

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