

Program Team – Chart Review Policy

Charts will be reviewed on a monthly basis for the intakes 2 months prior to the date of review. For example, in the month of March, all the intakes from January will be reviewed. This will ensure that all funder-required forms have been signed, dated, and included in the chart. This process will also ensure that all assessments and necessary referrals have been made and that proper supporting documentation is in the chart.

Procedure

1. The Program Director will designate which program manager meeting will be used for chart review
2. The Program Director, or designee, will ensure that the appropriate charts have been pulled for review prior to the meeting.
3. The Program Director will ensure that a census and chart review guide (a blank chart review form) are provided for each manager.
4. Each resident's chart on the census will be reviewed and a chart review form completed and signed to document the results. Any follow-up required by staff will be completed following the chart review and any supervision action needed will be done so by the appropriate manager.

Executive Director