

## Attachment C

### Consumer Service Record Review Format

Name of Reviewer: \_\_\_\_\_

Date of Review: \_\_\_\_\_

Name of CIL: \_\_\_\_\_

Complete this form for each CSR reviewed to determine compliance with CIL Standard 9 - Consumer Service Record, IL End of Year Report, Part 1: Program Performance Report, section IV: Self-Evaluation with NYS Standards.

Name of Consumer: \_\_\_\_\_

The CIL maintains the following information for each Consumer Service Record:

Check Yes or No

1. Annually updates age, education status and employment status data on consumer intakes/profiles.

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ N/A active less than one year. Intake Date \_\_\_\_\_

2. There is a single document describing rights and responsibilities as a consumer of the CIL.

**NOTE:** Use of a separate signature form for a consumer to acknowledge receipt of an information packet that includes a rights and responsibilities document in lieu of the consumer signing a rights and responsibilities document is prohibited.

\_\_\_\_\_ Yes \_\_\_\_\_ No

- A. Document is signed by the consumer.

\_\_\_\_\_ Yes \_\_\_\_\_ No

- B. Document is dated.

\_\_\_\_\_ Yes \_\_\_\_\_ No

- C. Document describes the right to confidentiality.

\_\_\_\_\_ Yes \_\_\_\_\_ No

D. Document outlines the internal CIL appeals process that ends with the Board of Directors.

\_\_\_\_\_ Yes \_\_\_\_\_ No

E. Document provides notification to the consumer of the availability of ACCES-VR to consider consumer complaints about CIL services.

\_\_\_\_\_ Yes \_\_\_\_\_ No

1. ACCES-VR Contact office/person is identified.

\_\_\_\_\_ Yes \_\_\_\_\_ No

2. ACCES-VR consumer complaint phone number is provided.

\_\_\_\_\_ Yes \_\_\_\_\_ No

3. ACCES-VR address is provided.

\_\_\_\_\_ Yes \_\_\_\_\_ No

3. Identifies specific services received.

\_\_\_\_\_ Yes \_\_\_\_\_ No

4. Identifies dates of service contact.

\_\_\_\_\_ Yes \_\_\_\_\_ No

5. Includes relevant referral information when appropriate, provided by the CIL on behalf of consumers.

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ N/A referral information not appropriate

6. If a release of information is present in the CSR, then it contains:

A. Appropriate and legal information.

\_\_\_\_\_ Yes \_\_\_\_\_ No

B. The consumer signature and is dated within 120 days.

\_\_\_\_\_ Yes \_\_\_\_\_ No

C. \_\_\_\_\_ N/A release of information not present in the CSR

General Comments:

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