The Home and Community Based Service (HCBS) case record review (CRR) tool is used to complete uniform case reviews statewide. This review tool is used by Division of Senior and Disability (DSDS) staff identified to review HCBS cases each month, to monitor participant case records conducted by DSDS staff and provider reassessors. CRRs ensure timeliness, appropriate documentation, accuracy of recordings, and compliance with HCBS policy when conducting assessments and developing care plans.

**Distribution and Return**

The CRR assignments will be randomly selected and emailed to all identified review staff from the Bureau of Systems and Data Reporting (BSADR), Quality Improvement Quality Assurance (QIQA) Unit on a monthly basis. Upon completion, CRRs shall be returned to the QIQA Unit by responding to the initial distribution email. All CRRs shall be completed by the last business day of the month.

**Supervisor Reviews**

EachAdult Protective and Community Supervisor (APCS) is required to complete case reviews utilizing the CRR tool for all Adult Protective and Community Workers (APCW) and Long Term Care Specialists (LTCS) completing assessments and care plan changes. Staff shall not be notified of which records are being reviewed prior to the CRR being completed.

For each APCW in case approval status, the APCS is required to review a minimum of one (1) case action per team member per month and enter these reviews into the electronic case record review tool.

Case review requirements utilizing the CRR tool do not negate the responsibility of the APCS to review all work for each APCW who has not received case approval status.

Case approval status may be granted after the APCS has reviewed the APCW’s work for a minimum of three (3) months. Case approval status shall only be obtained by written approval from the Person Centered Care Planning (PCCP) Bureau Chief or Regional Manager.

**Regional Managers and Central Office Reviews**

Each month Regional Managers (RMs) shall be assigned one (1) record per team from a region on a rotating schedule.

BLTSS Staff and the Hearings Unit shall be assigned case record reviews dependent upon program need.

**Remediation**

All case actions requiring remediation must be remediated in a timely manner. As remediation needs are identified by the reviewer, the appropriate supervisor shall be contacted to oversee the remediation. It is the responsibility of the APCS to ensure the remediation was completed.