

5101:2-20-04

Adult protective services case records.

- (A) The county department of job and family services (CDJFS) or its designated agency shall develop and maintain a case record for each adult who is the subject of a report of abuse, neglect, or exploitation. This case record shall document all activities performed by the CDJFS or its designated agency from the time of receipt of the ~~report~~ referral of abuse, neglect, or exploitation until the closing of the report.
- (B) The case record shall contain all documents and communications pertaining to the investigation of a report and the provision of adult protective services. These documents shall include, but are not limited to:
- (1) The ~~initial intake~~ screening report.
 - (2) The investigation/assessment report.
 - (3) The protective services plan, any applicable reviews and all amendments.
 - (4) Correspondence.
 - (5) Professional reports and/or amendments.
 - ~~(6) Protective service plan reviews and/or amendments.~~
 - ~~(7) Documents which include, but are not limited to, (if applicable):~~
 - ~~(a) Notice of intent to investigate.~~
 - ~~(b) Voluntary consent of an adult to the provision of protective services.~~
 - ~~(c) Court petitions.~~
 - ~~(d) Court orders.~~
 - ~~(e) Release of information.~~
 - (6) Notice of intent to investigate.
 - (7) Voluntary consent of an adult to the provision of protective services.
 - (8) Court petitions.
 - (9) Court orders.
 - (10) Releases of information.

- (C) The case record shall contain a narrative which documents chronologically all activities performed in the investigation, and the provision of adult protective services. The case narrative shall include but is not limited to:
- (1) Phone calls.
 - (2) Personal interviews.
 - (3) Reason and date for adult protective service termination.
 - (4) Dates(s) of receipt and preparation of documentation or communication as specified in paragraph (B) of this rule.
- (D) The case record shall be considered confidential and not public record. Information contained in the case record shall, upon request, be made available by the CDJFS or its designated agency to the adult who is the subject of the report, agencies authorized by the CDJFS or its designated agency to receive the report, and legal counsel for the adult.
- (E) The case record shall be retained by the CDJFS and its designated agency for a minimum period of three years from the date of case termination.

Effective:

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Certification

Date

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