**Section 230.640 Records and Documentation**

a) A Case Coordination Unit (CCU) shall maintain individual client records in a central file. The case file for each client shall minimally include the following information:

1) Intake Form(s);

2) Comprehensive Needs Assessment;

3) Case Plan;

4) Record of referral(s) and request(s);

5) Correspondence related to the case;

6) Formal case notes, which include documentation of the follow-up and/or case closure;

b) Case files shall be maintained in a manner that shall strictly maintain confidentiality of all information (refer to 89 Ill. Adm. Code 220.100 and subsection 230.610(d)).

c) Upon change in CCU designation (specified in 89 Ill. Adm. Code 220), the CCU which has been de-designated shall transfer all specified records as prescribed by the Area Agency on Aging to the newly designated CCU.

(Source: Added at 15 Ill. Reg. 18642, effective December 13, 1991)