

**County of Orange Social Services Agency
Family Self-Sufficiency & Adult Services Division**

Program/Area: In-Home Supportive Services
Title: Release of Case Records Policy
Number: 1043
Effective Date: 1/11/19
Approved: Signature on File

Status: Final
Revision Date: 11/30/2019

POLICY

The County will comply with an applicant/recipient's request to inspect his or her case record. Inspection will be provided as expeditiously as possible to ensure the applicant's/recipient's request is fulfilled. The County may determine, in conjunction with County Counsel, as necessary, if specific documents requested by an applicant/recipient are privileged and may not be released or otherwise confidential under applicable laws.

When an applicant/recipient requests to review his/her case record, the County will:

- 1) Comply with timelines and procedures for response.
 - 2) Determine what records are requested and identify all responsive records.
 - 3) Take appropriate steps to not disclose exempt material, including consulting with County Counsel.
 - 4) Collaborate with effected agencies to ensure timely and accurate documentation requested is available for review and/or release.
 - 5) Coordinate a time for the recipient to pick up, or review the documents.
 - 6) Collect applicable fees for copying of inspected/requested documents.
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