

**Cottonwood, Inc.  
Policies and Procedures**

**SECTION:** Consumer Related  
**SUBJECT:** Consumer Orientation  
**EFFECTIVE DATE:** July 1987

**POLICY NO:** 05-004  
**PAGE(S):** 1 of 1  
**Licensing Regulation  
Reference:** 30-63-29

**Policy:**

All individuals accessing Cottonwood, Inc. services, and as appropriate, their parents or guardians will be provided with an orientation to Cottonwood, Inc. covering available services and organizational policies.

**Procedures:**

1. During the first week of service provision the designated Cottonwood, Inc. case manager will schedule a meeting with the consumer and as appropriate, the family, and or guardian to provide an orientation to Cottonwood, Inc. Communication will be in a form which is understood by the individual or their representative. For consumers who do not have a Cottonwood, Inc. case manager, the designated Cottonwood, Inc. case manager will provide the orientation. Additionally each department orients the consumer to their area.
2. The Consumer Handbook will be given to the individual at this time and explained. Rights and responsibilities will be discussed. The Handbook and accompanying Memo of Understanding serves as Cottonwood's Service Agreement for direct services. For targeted case management (TCM) there is a separate TCM Application and Service Agreement.
3. The Family Handbook will be given to the individual's personal representative.
4. During the meeting, the services in which the individual will be participating will be explained. The process of development of action plans will be discussed and how the consumer is to participate in lifestyle planning will be emphasized.
5. Financial arrangements will be explained fully and discussed with the individual and/or their guardian(s). Discussion will include and stipulate the rate for services to be provided and any payment expected from the individual.
6. Emergency procedures will be discussed.
7. The purpose and general contents of the case record will be relayed to the individual and/or their guardian and the procedure will be explained as to how to access case record information.
8. Also, at this time, required documentation will be completed as identified on the orientation checklist.