## Organisation Review

<table>
<thead>
<tr>
<th>Org name</th>
<th>Date of review</th>
<th>General comment</th>
<th>Form completed by</th>
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**Case management and recording system in place**
- Yes/No
- Comments and evidence submitted

**Up to date resources and systems in place to update**
- Yes/No/Partial
- Comments and evidence submitted

**Process for signposting/referral in place and used**
- Yes/No/Partial
- Comments and evidence submitted

**Service standards in place and updated regularly**
- Yes/No/Partial
- Comments and evidence submitted

**Regular checking system for advisers in place**
- Yes/No/Partial
- Comments and evidence submitted

**Internal quality info/advice audits in place**
- Yes/No/Partial
- Comments and evidence submitted (summary of three monthly audits of advisers casework expected)
Has feedback been sought from customers on a regular basis? | Yes/No  
Comments and evidence submitted – copies of customer feedback reports and action

<table>
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<tr>
<th>Is there professional indemnity insurance covering the service?</th>
<th>Yes/No</th>
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<td>Yes/No</td>
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Organisation comments