**245-D Audit Tool**

**Client File:**

**Date Reviewed:**

**Most recent files up to date?** (Date Listed)

1. **SAL**
2. **Releases of Information**
3. **Annual documentation**

**Annual documentation completed correctly?** (Date Listed / Signatures?)

1. **IAPP**
2. **SMA**
3. **CSSPA**
4. **Current CSSP**

**Progress Notes in file?** (Yes/No)

**Next annual on Calendar**?