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For DD AFH INDIVIDUAL RECORD NOTEBOOK/FILE

(As a reminder, keep a copy of this table of contents in each person's notebook.)

Note: Always file the most current information to the front within each section.

SECTION 1: CLIENT INFORMATION

- a. Individual Summary Sheet
(Keep this at front of notebook so it is easy to find in an emergency!)
- b. Resident's Bill of Rights- *review annually with individual and guardian*
- c. Adult Foster Home – House Rules – *review annually with individual and guardian*
- d. Residency Agreement – *review annually with individual and guardian*

SECTION 2: PROGRESS NOTES

- a. Progress Notes: At least Monthly summary of progress
- b. Goal tracking/data tracking info

SECTION 3: MEDICAL

- a. Medication Administration Records (MAR's) – most recent on top
 - Current MAR can be kept locked with medication
- b. Drug Disposal Record
- c. Medical, Dental or Health Service Contacts
- d. Physician orders- *signed by physician with most current on top*
- e. Balancing Test – Physician Portion on back
- f. Medical Protocols
- g. Health Tracking Records (e.g. weight, seizure, BM, fluid intake, etc.)
- h. Medical history: immunization records, special diets, releases of info

SECTION 4: SERVICE PLAN / ISP / INCIDENT REPORTS

- a. ISP Meeting Agenda
- b. One Page Profile
- c. ISP (*received from Service Coordinator*)
- d. Change Forms (if applicable)
- e. Person Centered Information (PCI) - *updated at least annually*
- f. Risk Identification Tool (RIT) - *updated/reviewed at least annually*
- g. Provider Risk Management Strategy (PRMS) –*ensure all risks from RIT are listed*
- h. Support Documents (e.g. Safety Plan, FA and BSP)
- i. IEP *for individuals in school*
- j. Situation Where An Incident Report is Required to be Completed
- k. Incident Report – send to case manager and keep copy in file

SECTION 5: FIRE DRILL / EVACUATION PLAN

- a. Documentation of Initial Emergency Exit Orientation
- b. Household Fire Exit Plan
- c. Evacuation Drill Record Requirements
- d. Evacuation Drill Records – can be maintained in a facility binder.

SECTION 6: LEGAL / FINANCIAL/ Misc.
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- a. Current Financial Plan
- b. Personal Property Record – *update annually*
- c. Ledgers (e.g. Cash on hand, checking, savings, ABLE)
- d. Bank Statements - *Reconcile per frequency outlined in financial plan*
- e. ISP Team Approval for Purchases – *as required by financial plan*
- f. Paycheck Stubs (if applicable)
- g. Misc correspondence (e.g. SDS, SSI, etc.)
- h. Entry/Transfer/Exit Paperwork (*Referral packet, eligibility, etc.*) **KEEP FOREVER**