

CHECKLIST FOR CONSUMER DOCUMENTATION

(To be filed in the front of each consumer's blue notebook)

The following documents/information should be maintained for each consumer in the facility and placed in the indicated sections in this notebook:

FACE SHEET

- All blanks filled in (place "unknown" in any blank where information is not available)
- Recent picture attached (or attached to binder)

PLACEMENT INFORMATION

- Consumer Referral Form
- Signed Admission Agreement
- Any consumer social or psychological evaluations
- Signed House Rules
- Documentation of informing consumer of grievance procedure
- Signed Consumer's Rights Statements (updated annually)
- Any consents for Release of Information

IPP & PROGRESS

- Current IPP
- Ongoing written consumer notes
- Quarterly Reports

MEDICAL

- Consumer Health Record Form with dates of all medical/dental appointments; hospitalizations; illnesses, and injuries
- A copy of the Admission Physical
- Seizure Record (if applicable) with dates, times and description of all seizures
- Medication Record Form
- Centrally Stored Medication and Destruction Record Form (Licensing Form 622)
- Height and Weight Record/Immunization and Communicable Disease Record Form

SCHOOL/VOCATIONAL

- Copies of any IEPs, IHPs, or other school or day program reports

INCIDENT REPORTS

- Copies of the written report for any special incidents reported to Community Care Licensing and the Regional Center

FINANCIAL RECORDS

- A record of all consumer personal funds

This record should include:

- Entries for all personal funds received (P & I, gifts, etc.) for the consumer
- Entries for all purchases made for the consumer
- Entries for all cash given to the consumer (with the consumer's initials indicating receipt)
- The current balance of the account
- All entries in this record should be in ink
- Receipts (filed in chronological order) for all purchases made for the consumer by the provider