

## CONTENTS OF CLIENT BINDER

### PICTURE

- CURRENT LOOKING PHOTO OF THE INDIVIDUAL

### IDENTIFYING INFORMATION

- FACESHEET LONG FORM (LOCATED ON MANAGER PAGE BOTTOM RIGHT OF PAGE)
- COPY OF UPDATED ID
- COPY OF BIRTH CERTIFICATE
- COPY OF SOCIAL SECURITY CARD

### INSURANCE

- COPY OF MEDICAID CARD
- COPY OF MEDICARE CARD
- COPY OF ANTHEM OR UNITED HEALTH CARE CARD
- COPY OF ANY OTHER CARDS (WELLCARE, AARP, SILVERSCRIPT, ETC.)

### MEDICAL

- INDIVIDUAL SPECIFIC TRAINING/DELEGATION FORM
- SELF ADMINISTRATION ASSESSMENT –ORAL AND TOPICAL MEDICATION (LOCATED AT END OF ISP USALLY COMPLETED BY NURSE OR SSA)
- PHYSICIAN'S ORDER
- OVER THE COUNTER (FROM THE ANNUAL PHYSICAL)

### ANNUAL SERVICE PLAN

- ISP – INDIVIDUAL SERVICE PLAN WITH CURRENT SIGNATURES (MAKE SURE PREVIOUS SIGNATURE SHEET IS FILED IN PROVIDE)
- PLACE COPY OF CURRENT SERVICE GOALS AS A REMINDER OF WHAT NEEDS WORKING ON FOR CURRENT YEAR.

### RELEASES AND LEGAL DOCUMENTS

- CHOICES RELEASE OF INFORMATION
- GUARDIANSHIP PAPERWORK
- POWER OF ATTORNEY

### TRAINING

- CICL INDIVIDUAL TRAINING CHECKLIST (ALL NEW STAFF MUST SIGN AND COPY MUST BE SENT TO HR, YOU CAN TAKE A PICTURE AND EMAIL TO HRDOCs)
- CLIENT BIOGRAPHY (OPTIONAL JUST MORE INDIVIDUAL INFORMATION ON THE CLIENT)

## INVENTORY

- INVENTORY GUIDELINE
- INVENTORY RECORDS

## FORMS

- APPOINTMENT TRACKING SHEETS
- 4 COPIES OF MEDICAL APPOINTMENT SHEET
- 2 BLANK COPIES OF LAB
- 2 BLANK COPIES OF ANNUAL PHYSICAL FORM
- 2 BLANK COPIES OF DENTAL SHEET
- 2 BLANK COPIES OF HEARING FORM
- 2 BLANK COPIES OF VISION