

CLIENT BINDER

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PICTURE - CURRENT PHOTO OF THE INDIVIDUAL

IDENTIFYING INFORMATION

- UPDATED CONSUMER DEMOGRAPHICS
- 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 USUALLY COMPLETED BY NURSE OR SSA) REDO EVERY TWO YEARS
- PHYSICIAN'S ORDER PRINTED EACH MONTH
- BLANK MAR PRINTED EACH MONTH
- BEDTIME AUTHORIZATION FORM (DONE YEARLY)
- DO NOT RESUSCITATE ORDERS (DNR)
- OVER THE COUNTER MED FORM (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 (AUDIT REPORT).

RELEASES AND LEGAL DOCUMENTS

- CILC RELEASE OF INFORMATION
- GUARDIAN PAPERWORK
- POWER OF ATTORNEY
- BURIAL INFORMATION

TRAINING

- CLIENT BIOGRAPHY

INVENTORY

- INVENTORY GUIDELINE
- INVENTORY RECORDS (REPLACE YEARLY)

FORMS

- MEDICAL APPOINTMENT TRACKING FORM
- 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

Communication / Training Binder

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Communication Log Notes

Program Record (Keep 30 days' worth)

Contact Information

Important Phone Numbers for the Program Including Staff

Duty List

Printed Duty List for Each Shift

Staff Meeting Agenda / Minutes

Sign in Sheets Attached to the Agenda/Minutes for the year

Visitors Policy and sign in/out sheet

Staff Area Consent Form

Trainings (Use sign in sheet for each)

Program Specific Training Sheet (Sign and Date the Back)

- New Employee Training (send to HR when completed)
- Emergency Procedures for (your program name)

DSP Training Sheet: Reporting Work and Things to Report

Packaging Meds

Quick Mar Training and How to fill out a paper MAR

UI/MUI Training

Fire Drill and Severe Weather Drill Trainings and Schedules

- How to enter a fire/severe weather drill

Van Training includes: seatbelts, tie downs, lift etc.

Stand Alone trainings: (epi pen, VNS, OTC topicals for cleansing/comfort of hair, nails, skin and teeth). Only one training sheet is needed for the program. Have staff sign the back page of each training sheet.

Other _____

Van Mileage

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Mileage Sheets

Client Pictures with Name Under Each Picture

Client Demographics with Contact Numbers

Insurance and Registration

Vehicle Location Sheet

Monthly Van Checklist

Accident Reporting Form

Wex Card Information

*Make sure there is a fire extinguisher, roadside assistance kit, first aid kit with gloves in the van at all times.