

Client Binder Organization Guide

- Individual Summary Sheet
- Individual Emergency Sheet
- House Rules
 - Must have a documented annual review
- Bill of Rights
 - Must have a documented annual review
- Residency Agreement
 - Must have a documented annual review
- PRMS
 - Must list all risks identified on the RIT
 - It is helpful to list the risk exactly as it is listed on the RIT
 - All risks indicated in the “Other” sections should be listed separately on their own line
- One Page Profile
- ISP
 - Must be for the current plan year
 - Must be signed
- PCI
 - Must be dated
 - Must include contributors
 - Must have narrative in all sections, N/A is rarely acceptable
- RIT
 - Must be current (within the past year)
 - Must have names at the bottom
 - Should match the ISP known risks
- Safety Plan
 - Must list all risks identified on the RIT
 - It is helpful to list the risk exactly as it is listed on the RIT
 - All risks indicated in the “Other” sections should be listed separately on their own line
 - All risks should detail 3 things
 - What does the risk look like for the individual
 - How do you/staff support them or mitigate the risk
 - What do you/staff do if it happens anyways
 - Notifications if any
 - Documentation

- Nursing Care Plan
 - Delegations if applicable – must be current
- Protocols
 - Must be detailed and clear
 - Must not have any blanks
 - If tracking is indicated for anything (BM, meals, fluids, skin checks, etc..) tracking should be kept with the MAR
- IBL's if applicable
- Functional Behavioral Assessment
- Positive Behavior Support Plan
 - Must be current or have documentation that an annual review has happened within the past year
 - Annual review can be documented by your service coordinator in the RIT
- Data tracking
 - Required for any individual with a PBSP
 - Must be on the approved tracking sheet from the behavior professional
- Progress notes - required
 - Should be in narrative form
 - Unique to each individual in the home
 - No copy and paste
 - Include details about their quality of life (where did they go to eat, what movie did they watch, did they enjoy it? etc...)
- Activity log – check ISP to see if this is required
 - Can be used to track progress toward Desired Outcomes listed in the ISP
- Physicians Orders
 - Must be signed by the physician
 - Must be dated within the past year
 - After visit summaries are not acceptable unless they have been electronically signed and they must match the MAR
- Balancing tests
 - One form per medication is best practice
 - Must be signed by the physician
 - Must include a list of potential side effects
- MARs
 - Licensors will review all MAR's for the past year
 - All pages should be present and signed
 - NO WHITE OUT EVER!

- Medication Disposal Log
- After Visit Summaries
- Financial Plan
- Financial Ledgers
 - Room & Board ledger
 - Cash Ledger
 - Checking Ledger if you are the Payee
 - Receipts should be numbered
 - Best practice is to staple an envelope to the ledger page and store receipts in the envelope in order
- Property record
 - Must include serial numbers for electronics
 - Must include an annual review
 - Date of annual review and note that all items listed have been accounted for.
- Other
- Variance
- Eligibility information
- Guardian paperwork