



Table of Contents – Client File

- I. **Emergency Information**
Face Sheet/Emergency Contact Information
Photograph of Client with physical description
Allergy Documentation
- II. **Admission Documents**
Admission Agreement with Rate Page
Consent for Medical Treatment
Client Rights and House Rules
Financial Documents (POS Records, SSI/Social Security Correspondence/Records, Medi-Cal)
Conservatorship/Legal Guardian Documentation
- III. **Regional Center**
IPP
Annual Review or Consumer Profile
CDER
- IV. **Facility Reports**
Semi-Annual/Quarterly Reports
Behavioral Assessment (Level 4)
Annual Treatment Plans (Level 4)
- V. **Consultant Logs (Level 4)**
- VI. **Client Notes**
- VII. **Special Incident Reports**
- VIII. **Medical**
Annual Physical Exams and T.B. Clearance
Physician Notes
Weight Records
Immunization Records
- IX. **Lab Work**
Lab work/X-rays
- X. **Dental Exams**
- XI. **Medication Records**
Centrally Stored Medication and Destruction Record
Medication Logs
- XII. **Neurological Consults**
Seizure Records
- XIII. **Psychological/Social Assessments**
Psychiatric/Psychological Consults
LCSW/QMRP Consults (Group Homes)
- XIV. **Day Program/School**
IEP/Day Program Progress Reports and ISP-s
- XV. **P & I Ledgers and Supporting Receipts**
- XVI. **Miscellaneous**
Personal Inventory Record