



Policy & Procedure Manual

CASEBOOK FILING ORDER – RR-I-17

POLICY:

All casebooks shall be kept in a specified filing order.

PURPOSE:

To ensure that a standardized, concise and complete record is maintained for each client.

PURPOSE:

Casebooks will be maintained in the order specified in Appendix A.

RECOMMENDED BY: Manager of Finance

APPENDICES: 1

OPERATIONAL ACCOUNTABILITY: Administration, Finance, Client Services
Administration, Client Services

ORIGINAL POLICY DATE: May 1993

AUTHORIZED BY: Executive Director

SIGNATURE:

CLIENT INFORMATION

- a. Admission & Discharge Summary
- b. Information Regarding Funeral Arrangements

SECTION I - INDIVIDUAL SUPPORT AGREEMENT, PERSONAL PLAN AND ACTION PLANS

- a. Individual Support Agreement
- b. Personal Plan
- c. Action Plans

SECTION II – MEDICAL/GRAPHIC CHARTS

- a. Admission & Annual Examination
- b. Appointment Register
- c. Vital Signs
- d. Menstruation Record
- e. Restraint Record
- f. Weight Charts
- g. Immunization Record
- h. Hot Weather Precautions

SECTION III – SEIZURE RECORDS

- a. Seizure Record
- b. Seizure Record - Diagnostic

SECTION IV – CLIENT NOTES

- a. Client Notes

SECTION V – MEDICATIONS & TREATMENTS

- a. Medication & Treatment Signature Sheet
- b. Physician Orders

SECTION VI – MULTI-DISCIPLINARY NOTES

- a. Multi-disciplinary Notes

SECTION VII – CONSULTATIONS

- a. Consultation Reports (Seating, Mobility)
- b. Assessments (CRT, Psychiatric, Speech, Hearing, Behavioural)

SECTION VIII – CORRESPONDENCE

- a. Authorizations
- b. Consents
- c. Client's Valuables Listing
- d. Correspondence