# **Sample of Resident File**

# Individual Program Files

## Identification Information

### Resident Face Sheet/Service Recipient Information Cover Sheet

### Admission Form and Data Sheet

### Census/Admission & Discharge Register

### Social Security Card, MN ID, Birth Certificate, Current Photo

### Resident Information

### Guardianship Documents

### Burial Plans

### Life Insurance

### Copy of Health Care Directive

## CSSP/CSP/IEP/IRPA

### Social History

### Coordinated Service and Support Plan

### Coordinated Service and Support Plan Addendum Review

### Individual Education Plan (if applicable)

### Individual Resident Placement Agreement (IRPA)

### Community Support Plan

### Receipt of Admission Forms

## Rights and Vulnerability

### Policy Receipt and Signature Page

### Policy and Procedure Manual Notifications

### Resident Rights and Verification of Receipt

### Rights Restrictions

### Individual Abuse Prevention Plan (IAPP)

### Notice of Privacy Practices

### Vulnerable Adult Act Summary

## Assessments

### Self-Management Assessment

### Mobility Access Assessment

## Support Plan and Interdisciplinary Team Review

### Team Meeting Attendance Sheet

### Progress Review Report

### Appointment Management

### Review of Outcomes

### Support Team Meeting Summary

### Financial Statement

### Service Outcomes and Supports

### Progress Review Meeting Summary

### Person Centered Planning and Service Delivery Requirements

### CSSP Request Letters

## Positive Behavior Supports

### Positive Support Strategies and Evaluation

## Progress Notes

## Incident Reports

## Day Services

## Psychological

## Consents and Releases

### Releases of Information

### Pet Authorization Form

### Shared Bedroom Consent

## Financial

### Foster Care Rate Worksheet

### Service Agreement

### Placement Agreement

### Permission to Manage Resident Funds

### Cash Resources Procedures

### Cash Resources Record

### Legal Issues

### Explanation of Medical Benefits

### Financial Notification of Charges

### Financial Correspondence

### Billing and Service Documentation

### Social Security Notices

### Personal Property List

### Residency Agreement

## Memos/Misc

### Service Admission Checklist

### Service Recipient Record Checklist

### Support Team Notification

### Activities of Daily Living

### Notes

### Correspondence

### Reports from Other Agencies

### Service Satisfaction Survey

### Incident Reports from Work Site

### Quality Management Evaluation and Program Improvement Plan

# Individual Medical Files

## Identification Information

### Service Recipient Information Cover Sheet

### Appointment Management Record

### Resident Information Sheet

### Medical Insurance Cards

### Health Needs Record

### Health Needs Change Notice

## Medical Orders

### Physician Orders

### Medical Appointments

### Standing Order Medication List (PRN)

### Over the Counter Medication Log

## Medical Documentation

### Medication Assistance Policy

### Medication Administration Record (MAR)

### Medication Permissions

### Physician’s Approval for Self-Administration

### Injectable Medication Authorization

### Side Effect sheets for current medications

### Request for Medical Report

### Medication Review Record

### Communicable Disease Verification

## Physical

### Admission Physical Summary

### Annual Physical Report Summary

## Labs/X-Ray/Immunizations

## Dental

## Dietary/Nutrition

### Allergies

### Dietary Restrictions

## Specialized Services

### Audiology, Allergies, Dermatology, Neurology, Ophthalmology, Orthopedics, Podiatry, Seizure Protocol, Speech. Urology

## Medical Authorizations

### Medication and Emergency Medical Authorizations

### Authorizations for Medical Procedure

## Psychotropic Medications

## Advance Directives