



## 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