

File Organization

The following are suggestions to help agencies improve the organization of Client Clinical Folders:

In order to make Client/Clinical files easier to manage, CAHC suggests all employee paperwork be filed in a similar sequence.

This can be done using either an according type file folder with divided tabs, or a file folder with added sheet tab dividers for each client.

This type of organization system is recommended as it will make filing documents and locating them quick and easy for the agency, but it is not required by CAHC. Agencies can devise their own filing system that is consistent throughout all client folders.

An example how to set up client/clinical files is to organize the paperwork into sections as shown below:

- Section 1:** Intake
 - Job Order
 - MD Order CBSN
 - Certificate of Need CPCS

- Section 2:** Advance Directives
 - Bill of Rights
 - Acknowledgment of Consumer Guide

- Section 3:** Initial Assessment
 - Reassessment

- Section 4:** Plan of Care
 - Medication Profile (CBSN)
 - MARS (CBSN)

- Section 5:** Case Monitoring Reports

- Section 6:** Orientation to Case/Supervision of Staff (PCA/PDN)

- Section 7:** Nursing Progress Notes

- Section 8:** Miscellaneous paperwork specific to agency

- Section :** Discharge Summary

Helpful Tip:

Start of Care (SOC) should be prominently displayed on the client s record