

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 using a file system to keep all client/clinical paperwork organized in a similar fashion.
- A file folder with added tab dividers or an accordion type file folder with tabs is recommended for each employee record, but not required by CAHC. Agencies can devise their own filing system to organize their client/clinical records.
- An example how to set up client/clinical files with documents organized by category (or sections) is shown below:

Section 1:	Intake Job Order MD Order (CBSN) Certificate of Need (CPCS) Service Agreement Insurance Authorization
Section 2:	Advance Directives Bill of Rights Acknowledgment of Consumer Guide
Section 3:	Initial Assessment Reassessments
Section 4:	Plan of Care (CPCS)/485 (CBSN) Medication Profile (CBSN) Medication Administration Record (CBSN)
Section 5:	Case Monitoring Reports 30-day Telephone Calls
Section 6:	Orientation to Case/Supervision of Staff (PCA/PDN)
Section 7:	Nursing Progress Notes
Section 8:	Miscellaneous paperwork specific to agency
Section 9:	Discharge Summary

Helpful Tip:

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