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| **SERVICE RECIPIENT RECORD INDEX** |
| **Personal information Pouch**Information kept in this pouch may include: birth certificate, MA card, social security card, library card, fishing licenses, MN ID card, etc.**Identifying information*** *Admission Form and Data Sheet*
* Guardianship orders and documentation
* Other legal documentation

**Service initiation/admission information*** Service initiation information and verification of eligibility for services (i.e. screening document)
* Initial *Individual Abuse Prevention Plan*
* Initial *Coordinated Service and Support Plan* and *Coordinated Service and Support Plan Addendum*
* Copy of *Rights of Persons Served*
* *Policy Orientation Receipt (Copy of Policies Listed)*
* Initial authorizations and releases
	+ *Authorization for Medication and Treatment Administration and Assistance*
	+ *Authorization to Act in an Emergency*
	+ *Standard Release of Information*
	+ *Rights of Persons served (signed copy)*
	+ *Funds & Property Authorization*
	+ *Residency Agreement*

**Service planning and delivery*** *Support Plan*
* *Support Plan Addendum*
* *Self-Management Assessment* and *Individual Abuse Prevention Plan*
* *Outcomes*, *Behavior Plans*, and documentation
* *Progress Reports and Recommendations* and support team meeting notes
* Annual authorizations
	+ *Standard Release of Information*
* *Residency Agreement*
* *Medication Authorization*
* *Authorization to act in Emergency*
* *Rights of Person Served*
* Funds & Property Authorization
* Social, psychological, and medical histories and assessments
* *Progress Notes*
* Other service provider’s information
* Financial reports
* Discharge summary and information, if applicable

**Incident, grievance, and behavior reporting** * *Incident and Emergency Reports*
* Complaint and grievance documentation and resolution
* *Positive Support Transition Plan* information, if applicable
* *Emergency Use of Manual Restraint Incident Report* and *Behavioral Intervention Reporting Tool (DHS)*

**Health and medication administration record information*** Health-related information including diagnosis, allergies, and special dietary needs
* Current orders for medications, treatments, or medical equipment and standing order medication list
* Monthly medication sheets
* Authorizations
	+ *Authorization for Medication and Treatment Administration and Assistance (reviewed annually)*
	+ *Authorization to Act in an Emergency (reviewed annually)*
* Specific medication administration procedures and protocols
* *Medication Administration Record Reviews*
* Side effect information
* *Health Care Provider Appointment Schedule (in Therap past/future appointments)*
* Referral forms
* *Medical Referrals* (including annual physical exam) (using Physician order form or visit summary notes)
* *Mental Health Referrals*
* Miscellaneous
* Reports
* *Seizure Reports*
* *Medication/Treatment Error or Refusal* reports
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