

Organizing Your Child's Documents

The roadmap to care and services



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Why should I organize my documents?

Easy access to records

Learn more about your child

Clear understanding of disability / needs / goals

Paper Trail / Protect rights

Why should I organize my documents?

More effective advocacy

Increased confidence / feel empowered

Gain credibility

Lower stress

Getting Started

Decide on a system that works best for you:



Binder

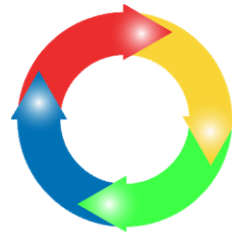


Box



File

Digital



Combination

Digital Record Keeping

As technology advances electronic records are a great way to back up hard copies

Digital records may not be considered “official” so it is recommended to maintain paper records as well.



Digital Record Keeping

- Can save space, reduce clutter
- Can store online, in a computer, on a CD, or flashdrive
- Can access all records from anywhere
- Can share documents with professionals easily.
- Can “search” documents for specific words
- Can take meeting notes on laptop or tablet



Getting Started

- Assemble records you currently have
- Decide what will go in the binder
- Decide how to organize/store the rest
- Request records not in possession



What documents should you keep?

- Information on your child
- Contacts / Communications log / correspondence
- Evaluations / consent forms
- Regional Center information
- Early intervention information
- Medical / Insurance information
- Information on other agencies serving your child
- Outside therapies
- Release of information forms

Requesting records

- You have the right to review and request records and other information about your child.
- Request in writing and make a copy for your records.
- Expect to receive notice about your rights and how to access records.
- Protects privacy by limiting access to records without parent consent

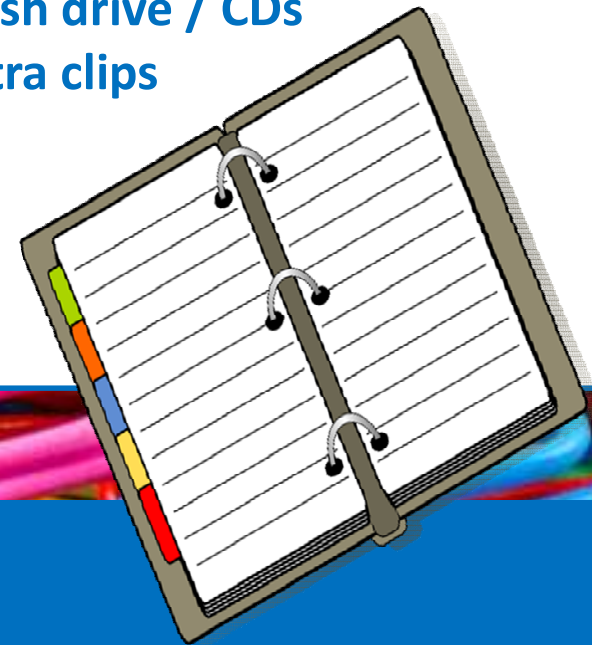
Optional records to keep:

- Information on disability
- Legal information
- DME
- Assistive Technology
- Person Centered Plan
- Child care
- School records
- More...?



Binder Organization: Important Elements

- **Binder / Cover**
- **Index**
- **Tabs**
 - Child information
 - Communication/Contacts
 - Evaluations
 - Regional Center
 - Early Intervention
 - Medical
- **Pockets**
 - Notes / Free space to put papers to file
- **Supply pouch**
 - Pens / pencils / highlighter
 - Sticky notes
 - Power cord
 - Hole punch
 - Section tabs
 - Flash drive / CDs
 - Extra clips



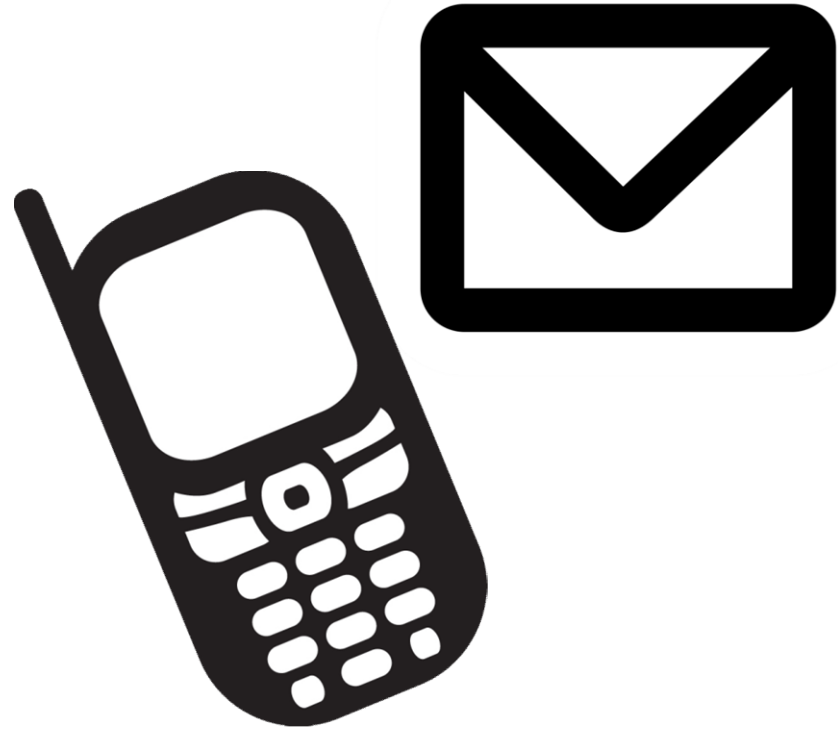
Child Information

- Birth Certificate (copy)
- ID cards
- Medical cards
- Other



Communication

- **Contact list**
- **Communication log**
- **Correspondence
(Letters / email)**
- **Business card holder**



Evaluations

- Request and/or referral for evaluation
- Assessment plans / Evaluation consent
- Evaluations



Regional Center

- IFSP
- Center information
- Docs other than IFSP



Early Intervention

- Agency Information
- Intervention docs



Medical

- Medical Reports from Primary Care or Specialists
- Summary of visits
- Test results (x-ray, lab, etc.)



Optional Additional Tabs

- Create a Tab for each additional agency your child is connected with
- Therapies (Speech, OT, PT, etc.)
- Disability Specific FAQ sheets/info
- Legal information – guardianship, etc.
- DME – Durable Medical Equipment and Assistive Technology
- Person Centered Plan or One Page Profile
- Child care

Pockets

- Free space to put documents that need filing
- Calendar
- Notes



Purge

- Go through binder to review periodically and update as needed.
- Move older documents to permanent storage (box, file cabinet) or create a new binder as needed.
- Err on the side of caution when deciding to discard anything



Helpful Tips!

- Put most current records on top of each section
- Mark dates on documents lightly with pencil
- Save originals for making additional copies
- Duplicates are not always what they seem!
- Make copies of all correspondence, forms, etc.



More Helpful Tips!

- Stick to organizing, do not stop and read all documents
- Consider scanning all documents
- Hole punch carefully. Use sheet protectors when necessary for important documents
- Clip large reports to hold together
- Can run into organization issues – where to store certain documents. Make a plan and stick with it!





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U.S. Department of Education

The contents of this resource were developed under a grant from the U.S. Department of Education #H328M200055. However, those contents do not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government.



The background of the entire slide is a close-up, slightly blurred image of many colorful paper clips in various colors including blue, yellow, green, pink, and red. They are tangled together, creating a vibrant, textured background.

Thank you for coming!

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evaluation before you leave.**

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