

Procedures: Temporary Patient Files/Notebooks

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Sumlar Therapy Services, Inc.

Notebooks: While permanent files are kept in the traditional folder/filing cabinet format in the front office, therapists need a quick method of accessing recent patient therapy notes on a frequent basis. Therefore, many Sumlar Therapy therapists use a portable notebook system for temporary therapy note management in school, clinic, and EI settings. The notebooks can be organized in any manner chosen by the therapist: by setting (clinic, school, or EI), or by location, or by day of the week. A therapist's caseload can be divided into as many or as few notebooks as he or she wants.

The therapist's notebook should be divided by patient, using tabbed dividers with the last name marked first, followed by the first name. The notes are filed in order with the most recent on the top.

Notebooks should always be kept clean and neat. When your notebook no longer is in good condition, get a new one.

In school and EI notebooks,

- the bottom page in each patient's section should be the Information Cover Sheet.
- The next document should be the evaluation.
- Even after purging, the Information Cover Sheet and the most recent evaluation should remain.

Starting a new school year/School Notebooks: Each student's section in the notebook should be clearly marked on a divider tab. Each should contain, from the bottom up,

- a School Information Cover Sheet,
- the most recent evaluation,
- the IEP Meeting Outcome Form (if the therapist attended the meeting),
- the IEP (at least the first page and the pertinent therapy page),
- the Therapy Quarterly Progress Report, and
- the Therapy School Record.

Each treating therapist should compare the IEP to the most recent therapy evaluation to make sure the therapy is appropriately recorded on the IEP, and that the goals, frequency, and duration are in keeping with what was decided by the therapist and IEP team. Any discrepancies should be reported to the supervising therapist (if the treating therapist is a Therapist Assistant) and to the IEP holder.

Purging

Original documentation is safest kept in our permanent files. Therefore, all therapists' school notebooks should be purged of excessive notes at least once per year; EI and clinic notebooks should be purged every three months. When you remove notes from your notebook, please paperclip them by patient to facilitate ease of filing. Keep the evaluation, most current updates, and any other paperwork you may need to refer to frequently in your notebook.