

## Documentation Checklist

### HEALTH: TRICARE, Insurance or other Funding Source Paperwork

- Documentation provided to or from a given funding source until the given issue is resolved and you have documentation of the resolution.
- Notes from conversations with insurance representatives (including date, time, and name of contact person).
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### SCHOOL:

- Each final, signed IEP
  - Your notes, copies of notes taken by school personnel
  - Documentation of Prior Written Notice
- Evaluation reports (e.g., psychological, speech/language, occupational therapy, and educational assessments)
- Special education eligibility and evaluation summaries
- Other paperwork (e.g. notice of action refused, written requests you've made)
- Report cards and progress reports
- Notes from important conversations with school personnel
- Other paperwork (e.g. notice of action refused, written requests you've made, notes from important conversations with school personnel)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### THERAPY: Private (not school-based) therapies

- Evaluation reports
- Progress Reports
  - Graphs of important data

## Documentation Checklist

- Home program documentation (when applicable)
- Other paperwork
  - Any formal letters provided by therapists
  - Notes from important phone conversations
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### OTHER, MEDICAL:

- Medical Evaluations
  - Diagnostic evaluations are particularly important and helpful
- Other paperwork
  - Referral documentation
  - Formal letters provided by medical personnel
  - Notes from important conversations with medical care providers
  - Information on specific medical procedures (e.g., asthma plan, seizure plan, feeding procedures)
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### NOTES: