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: