

**The Twelve of Ohio, Inc.**  
**CLIENT FILE CHECK LIST**

**SECTION 1: CLIENT INFORMATION**

- \_\_\_\_\_ Client File Check List
- \_\_\_\_\_ Client picture (dated: \_\_\_/\_\_\_/\_\_\_)
- \_\_\_\_\_ [Birth Family Contact Form \(Mass\) \(Toledo\) \(Elyria\)](#) \_\_\_\_\_ Police Reports
- \_\_\_\_\_ Signed Client Rights \_\_\_\_\_ Court Papers (journal entry)
- \_\_\_\_\_ Signed youth and family information \_\_\_\_\_ Social Security Card
- \_\_\_\_\_ Medical Card \_\_\_\_\_ Birth Certificate
- \_\_\_\_\_ [Personal inventory](#) / clothing receipts / Discharge inventory
- \_\_\_\_\_ [Consent for Release of Information \(90 days\) \(Mass\) \(Toledo\) \(Elyria\)](#)
- \_\_\_\_\_ All Satisfaction Surveys

**SECTION 2: Mental Health Assess. /ISP/Quarterly Review/Discharge**

- \_\_\_\_\_ [Application for Services – TX permission \(Mass\) \(Toledo\) \(Elyria\)](#)
- \_\_\_\_\_ [ODP](#)
- \_\_\_\_\_ [Discharge Summary](#)
- \_\_\_\_\_ [Quarterly Progress Review Addendum](#)
- \_\_\_\_\_ [Mental Health Assessment](#)
- \_\_\_\_\_ Letters of Invitation - directly under each corresponding ISP / Quarterly

**SECTION 3: Progress Notes (only billable notes)**

- \_\_\_\_\_ **Progress Notes:** Freedmed /TX notes (only billable activity)

**SECTION 4: Progress Notes (Non-billable notes)**

- \_\_\_\_\_ Incident reports – (in chronological order with MUIs and progress notes)
- \_\_\_\_\_ [Internal Disruption Staffing](#)
- \_\_\_\_\_ [Notice of Removal](#)
- \_\_\_\_\_ [Client weekly progress report](#) (in chronological order with all progress notes)
- \_\_\_\_\_ [Client Monthly Progress Report](#)
- \_\_\_\_\_ [Respite forms \(Mass\) \(Toledo\) \(Elyria\)](#) (in chronological order progress notes)
- \_\_\_\_\_ [Behavior management form](#)

**SECTION 5: EDUCATION RECORDS**

- \_\_\_\_\_ Grade Cards
- \_\_\_\_\_ Individual Education Plan (IEP)
- \_\_\_\_\_ Educational Assessments

**SECTION 6: MEDICAL**

- \_\_\_\_\_ [HIV/AIDS/Health Information Form \(ten years and older\)](#)
- \_\_\_\_\_ [Medical exam](#) \_\_\_\_\_ [Dental exam \(Form\)](#) \_\_\_\_\_ [Vision screen \(Optical Exam Form\)](#)
- \_\_\_\_\_ [Medical appointment Log](#) \_\_\_\_\_ [Medication Log](#)
- \_\_\_\_\_ Permission to Administer Psychotropic Medication
- \_\_\_\_\_ Immunization Records
- \_\_\_\_\_ [Comprehensive Medical Examination](#)

**SECTION 7: Diagnostic tools**

- \_\_\_\_\_ **Ohio Scales:** Intake, every 6 months, discharge
- \_\_\_\_\_ **Ansell Casey** (14 years, intake, 6 months, discharge)
- \_\_\_\_\_ **Kaufman** (intake/ annual/discharge - required also for ODP outcomes report at intake and discharge)
- \_\_\_\_\_ **DECA**
- \_\_\_\_\_ [Summary Of Early Childhood Assessment](#)

**SECTION 8:**

- \_\_\_\_\_ [Referral/Intake Information](#)
- \_\_\_\_\_ Individual Child Care Agreement
- \_\_\_\_\_ Case Plan
- \_\_\_\_\_ Psychological Assessments (previous)
- \_\_\_\_\_ [Youth Placement Form \(Mass\) \(Toledo\) \(Elyria\)](#)
- \_\_\_\_\_ [Unattended youth form](#)
- \_\_\_\_\_ [Change of Status Forms](#)
- \_\_\_\_\_ [Letters to service providers](#)
- \_\_\_\_\_ [Two-week assessment of placement](#)