



RECORDKEEPING SYSTEM FOR FAMILIES



Louisiana
PARENT TRAINING & INFORMATION CENTER

.....
Changing Lives. Every Day.

Developed by the Louisiana Parent Training and Information Center, a program of Families Helping Families of Greater New Orleans

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Introduction to Recordkeeping

Introduction



The reason we keep records is because it is impossible to remember everything. For the same reason, it is important to organize information because we all forget things.

There are many reasons why parents should keep important information about their child. Recordkeeping is a way to have the information you, the parent, need about your child on hand. Others may have some records, but parents are the ones who have the whole story. When a parent has a system for recordkeeping, all the information is in one place. That way, they don't have to search for information; they know right where to look. If you cannot advocate for your child due to illness or a tragedy, all of these important documents are in one place for another family member to locate and use to advocate in your place.

The Recordkeeping System developed by Louisiana Parent Training and Information Center, a Families Helping Families of Greater New Orleans project, is a tool for helping parents when working with professionals who serve their children. This system assists families in beginning a recordkeeping system that will work for them, keeps records together, and helps organize the information into relative sections.

Recordkeeping is a tool for preparing for meetings concerning your child. Reviewing past plans allows you to determine how future plans can be changed to meet your child's specific needs. It saves time for both parents and professionals. It speeds up the process of getting appropriate services for your child.

Good decisions can be made quickly if good, current information is available on which to base the decisions. Recordkeeping is a tool for documenting decisions that affect your child. Because people forget, it's important to have documentation concerning what people have committed to do. Recordkeeping is also a tool for sharing information about your child with others.

This recordkeeping system contains files and handouts on referrals, contact logs and meeting reports, consent forms, evaluation reports, IFSP/IEP, medical records, school reports, financial records, letters, and albums. In back of all the folders is a page on parents' rights regarding their child's records.

Remember, if at any time you start to feel overwhelmed or confused, or just need some advice, call us for support. Our numbers are (504) 888-9111 or (800) 766-7736 (Statewide toll free).



Telephone Log Section

Telephone Log

Keep a telephone log in this section.

Telephone Log

Sometimes important information is relayed via the telephone. Whether it be a call with your child's teacher, doctor, therapist, etc., it is important to document these phone conversations. We think parents should keep the information on a telephone log: the time and date, the person they talked to, and the important information discussed.

Telephone Log

DATE	PHONE NUMBER	PERSON

NOTES : _____

DATE	PHONE NUMBER	PERSON

NOTES : _____

DATE	PHONE NUMBER	PERSON

NOTES : _____

Telephone Log

DATE	PHONE NUMBER	PERSON

NOTES : _____

DATE	PHONE NUMBER	PERSON

NOTES : _____

DATE	PHONE NUMBER	PERSON

NOTES : _____

Telephone Log

DATE	PHONE NUMBER	PERSON

NOTES : _____

DATE	PHONE NUMBER	PERSON

NOTES : _____

DATE	PHONE NUMBER	PERSON

NOTES : _____



Education Section

Education

Organizing Educational Records in this Section

Including

- Consent Forms
- Evaluation Reports
 - Record of Evaluations
- Individualized Family Service Plan (IFSP), Individualized Education Plan (IEP), or 504 Accommodation Plan
- School Meetings
 - Meeting Notes
- School Correspondence
- School Reports
- School Referrals
- Parental Rights Regarding Records/Reports
- Other



Consent Forms

Consent Forms

Keep copies of signed consent forms in this section.

Any time parents are asked to sign a consent form, they should know what they are signing, ask questions before they sign, and get a copy of the signed form.



Evaluation Reports

Evaluation Reports

Keep copies of all evaluation reports in this section.

Put the most recent evaluation on top and the oldest on bottom.

Record of *Evaluations*

These could include any educational, psychological, speech and language audiologist, physical therapy, occupational therapy, or any other evaluation completed by professionals to help evaluate your child's special needs.

DATE	TYPE OF EVALUATION	EVALUATOR	COPY OF RESULTS RECEIVED



IFSP/IEP or 504 Plan

IFSP, IEP, or 504 Plan

Keep copies of all Individualized Family Service Plans (IFSP), Individualized Education Plans (IEP), or 504 Accommodation Plans in this section.

Put the most recent on top and the oldest on bottom.



School Meetings

School Meetings

This section includes the following

- **Meeting Notes (Handout):** Whenever parents go to a meeting with school personnel, they should keep meeting notes. Meeting notes don't have to be on this piece of paper, but should contain the information found on the "*Meeting Notes*" handout. Parents can put any meeting notes they have in this file.

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

A T T E N D E E S

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<hr/>	<hr/>
<hr/>	<hr/>

P U R P O S E O F M E E T I N G

M E E T I N G N O T E S

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

ATTENDEES

PURPOSE OF MEETING

MEETING NOTES

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name: _____ **Date:** _____

ATTENDEES

PURPOSE OF MEETING

MEETING NOTES



School Reports

School Reports

***Keep copies of any other school reports in this section.
Such as report cards, progress reports, etc.***

If the child is receiving any other special services or help that is not documented on an IEP, it is important to put some sort of documentation on this in this section as well, describing the help and who provides it to your child.



School Correspondence

School Correspondence

Keep copies of all correspondence you have received from the school in this section.

Keep copies of letters the school has written to you or you have written to the school about your child.

If you need assistance writing a letter to the school (i.e., requesting an evaluation, behavior concerns, requesting your child's educational records, etc.), please call Families Helping Families of Greater New Orleans at (504) 888-9111.



Parental Rights Regarding Records/Reports

Parental Rights Regarding Records/Reports

Parents are guaranteed specific rights concerning their child's school records. The information below discusses parents' rights concerning record-keeping.

Confidentiality: Parents have the right not to have their child's records shown to anyone who does not need to see them as part of their job. Others must have the parent's written permission to see their child's file.

Review of Child's Records: Parents have the right to inspect their child's official school records.

If Parents Disagree: If parents disagree with the information contained in their child's file, they may ask that the information be (1) changed or (2) removed.

If Information is Not Removed or Changed: Parents have a right to add a statement correcting the information they feel is inaccurate.

Parent copy: Parents have the right to obtain a copy of records concerning their child. They may be asked to pay for these copies. Generally, schools will provide one free copy to parents.



School Referrals

School Referrals

Keep all school referrals in this section.

Teachers or school staff may refer you to an organization that provides support and services to families of children with disabilities in the community.



Other School Records

Other School Records

Keep copies of any other school records you need on your child in this section.

Some examples of these records are:

- Samples of school work
- Photos of your child involved in activities
- Notes from teachers
- Observations
- Certificates
- Awards
- Anything else you believe is relevant



Medical/Insurance Records Section



Doctors & Specialists

Doctors & Specialists

Keep a contact list of all doctors and specialists in this section and any medical meeting notes or follow-ups with your child's doctor.

Doctors & Specialists

C O N T A C T L I S T

NAME:

PRACTICE:

WEBSITE:

EMAIL:

PHONE:

CELL:

ADDRESS:

NAME:

PRACTICE:

WEBSITE:

EMAIL:

PHONE:

CELL:

ADDRESS:

NAME:

PRACTICE:

WEBSITE:

EMAIL:

PHONE:

CELL:

ADDRESS:

Doctors & Specialists

C O N T A C T L I S T

NAME:

PRACTICE:

WEBSITE:

EMAIL:

PHONE:

CELL:

ADDRESS:

NAME:

PRACTICE:

WEBSITE:

EMAIL:

PHONE:

CELL:

ADDRESS:

NAME:

PRACTICE:

WEBSITE:

EMAIL:

PHONE:

CELL:

ADDRESS:

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

ATTENDEES

PURPOSE OF MEETING

MEETING NOTES

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

ATTENDEES

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PURPOSE OF MEETING

MEETING NOTES

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

ATTENDEES

PURPOSE OF MEETING

MEETING NOTES



Medical Records

Medical Records

Keep copies of all medical records in this section.

The section should include general health history information, immunization records, vision and hearing screenings, and any other medical information. If your child has significant health concerns and records, you should keep a separate medical binder.



Medical Referrals

Medical Referrals

Keep all medical referrals in this section.

Doctors may refer you to another doctor or specialist for needed care or to an organization that provides supports and services to families of children with disabilities in the community.



Insurance Information

Insurance Information

Keep all insurance information in this section.

Your private insurance policies and cards and Medicaid/LaCHIP information and cards are very important to keep up to date with and be able to find at any given time. Organizing this information here will keep it all in one place and easy to find.



Financial Records Section

Financial Records

Please keep the following type of information in this section. Before sharing this information with anyone, make sure there is a legitimate reason for sharing.

- W-2, tax forms, payroll stubs – Some services may require proof of income.
- Doctor, dentist, specialist receipts – These are probably tax deductible.
- Eyeglasses, hearing aids, other equipment receipts – These are probably tax deductible.
- Rent receipts, childcare receipts, utility bills – These may be used as deductible items from your total income when qualifying for certain subsidy programs.



Other Records Section

Other Records

Keep copies of any other records you need in this section.

Some examples of these records are:

- Samples of school work
- Photos of your child involved in activities
- Notes from teachers
- Observations
- Certificates
- Awards
- Other types of meetings
- Anything else you believe is relevant

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

A T T E N D E E S

P U R P O S E O F M E E T I N G

M E E T I N G N O T E S

meeting Notes

SCHOOL

MEDICAL

OTHER

Meeting Name:

Date:

ATTENDEES

PURPOSE OF MEETING

MEETING NOTES
