

PACT File Maintenance Checklist- HB EHS/Prenatal

Child/Pregnant Mom: _____ Area: _____

TRANSFERS

Home Based Teacher should collect the child's working and office files, as well as past files, and contact the FA/HBT at the center/area that the child is transferring to and coordinate getting them the child's files. These forms should be reviewed at the transfer visit according to the *Transfer Visit Plan*.

Check	Form Name	Circle or highlight option for sorting this file --->	Drop File or End of Year Child Leaving Program	Returning Children to HS or EHS
	HEALTH FORMS			
	Begin Health Sheet-original		Shred	Shred
	Health History- copy		Shred	Shred
	Follow up Progress Sheets - original		email to Health C, then shred	email to Health C, then shred
	Health Progress Sheet - original		email to Health C, then shred	email to Health C, then shred
	Emergency Care Information - copy		Shred	Shred
	Prenatal Health Assessment		email to Health C, then shred	email to Health C, then shred
	Physical - copy		Shred	Retain in File
	Immunization - copy		Shred	Retain in File
	Lead - copy		Shred	Retain in File
	TB Test - copy		Shred	Retain in File
	Vision/Hearing - copy		Shred	Retain in File
	Medical Alert, Medication, or Dietary Forms- copy		Shred	Shred
	Accident/Incident Report - copy		Shred	Shred
	Releases for Health Screenings- copies		Shred	Shred
	Parent Authorization for Health and Dev. Procedures		Shred	Shred
	EDUCATION FORMS			
	Parent Education Handout grid		Retain in file	Retain in File
	IFSP- copy		Retain in file	Retain in File
	Developmental Screening (ASQ & ASQ SE)		Retain in file	Retain in file
	Transition Plan Checklist- if applicable		Retain in file	Retain in file
	TS GOLD Reports for School Records		Retain in file	Retain in file
	Child Family Cultural Survey/Education for SR		Retain in file	Retain in file
	Parent/Teacher Agreement-original		Retain in File	Retain in File
	Parent Ipad loan agreement		Retain in file	Retain in File
	Timetable/calendar		Retain in file	Retain in file
	Home Visit Report Forms (HVR)		Retain in file	Retain in File
	SOCIAL SERVICE FORMS			
	Referral Forms - original		Give to F&CS Coor	Give to F&CS Coor
	Action Plans from other Agencies-copy		Shred	Shred
	Permission and Consent from Parents - copy		Shred	Shred
	Parent Guardian ID form & log, if applicable - copy		Retain in file	Retain in file
	Record of Birth		Retain in File	Retain in File
	Soc. Service Release of Info, original, if applicable		Shred	Shred

Directions: Attach this form to the front of the Child's Office File.

Drops- The HBT notifies the F&C Service Coordinator about a Drop. **HBT prints Individual Child Report from TS GOLD including all assessment periods. The file is brought to Central Office at the next staff meeting. Give child's portfolio to parents.**

When a Prenatal mom has her child: The PPC will be mother's drop date. HBT must notify F&CS Coor.

Confidentiality: Keep children's records in a secure location.

Never leave children's records on desks, tables, or places where others have access to them.