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CCG ARCHIVING CHECKLIST

**1. CASE NOTES**

* Include all hand-written and typed out case notes written by CCG
  + Try to avoid sticky notes
  + Dates on case notes should be within dates on “Goals Summary” page

**2. TRACKING REPORTS**

* Include all tracking reports from start to finish of case file
  + Separate from case notes

**3. RECEIPTS**

* Include all receipts from entire case
  + Receipts should include:
    - Name of CCG
    - Name of CM
    - Name of client
    - Signature by client if purchase of goods or furniture

**4. CLIENT’S PERSONAL DOCUMENTS**

* If client needs housing, you MUST include:
  + Copy of driver’s license
  + Copy of social security card
* Other items to include in case file if applicable:
  + Bank statements
  + Birth certificate
  + Alien registration card
  + Passport
  + Social security award letters

**5. EMAIL CORRESPONDENCE**

* Include all email correspondence regarding case
  + Put in order by date

**6. STATE AGENCY AND LEGAL DOCUMENTS**

* If client is in an ALF or AFH, you MUST include:
  + Service summary
  + Care assessment
* All clients MUST include:
  + Goals summary
  + Consent form
* Other items to include in case file if applicable:
  + Lease agreements
  + Housing vouchers
  + Doctor statements
  + Institution discharge forms
  + Support animal documentation