

# CHART MAINTENANCE

All paperwork should be filed in the client's chart each week following approval from the supervisor. Other students may have a need to review a chart for class or observation and the information should be readily available and updated.

- Student clinicians must bring their client's charts to the initial supervisory conference, **after reviewing it for accuracy**.
- Student clinicians must bring their client's charts to the mid-term and final supervisory conference, up dated.

When charts are submitted for review, they must be complete. It is the current graduate clinician's responsibility to make any needed corrections to the ordering of the items, and to make sure that the chart is functional and properly labeled. The Clinic Secretary Michele-- can assist with providing an intact chart and a label with the client's name when these needs are brought to her attention. If items are missing or not applicable, they should be so noted on the *Chart Review Checklist*. For example, a new client will need a new chart and a label, but will not have any items in the chart at the time of the initial conference.

Errors in and undocumented omissions from the chart will negatively impact the student clinician's practicum grade.

# Chart Audit Checklist

**Legend:**  
 √ = Present; Correct location  
 M = Missing  
 N/A = Not Applicable

Client's Initials \_\_\_\_\_; Semester of \_\_\_\_\_

	Initial Conference	Mid-term	End of Semester
<b>Opening 1, Left</b>			
Chart Review Checklist, on top			
Documentation of Attempts to Contact Ct.			
Client Attendance Record			
Case Hx			
Information from other agencies			
Authorization to Videotape			
Release(s) of Information (as needed)			
Fee Payment (every Fall), on bottom			
<b>Opening 1, Right</b>			
Diagnostic Reports, most recent on top			
Score Forms, under Dx Report/Dx SOAP			
<b>Opening 2, Left</b>			
Initial Therapy Plans, most recent on top			
<b>Opening 2, Right</b>			
Semester Summaries, most recent on top			
<b>Opening 3, Left</b>			
SOAP Notes, most recent on top			
<b>Opening 3, Right</b>			
Lesson Plans, most recent on top			
<b>Student Clinician's INITIALS</b>			
<b>Supervisor's INITIALS</b>			