

Caregiver Binder Setup Guide

A simple organization system for factual records, appointments, school information, reimbursements, and required follow-up.

Suggested sections

■ Current contact sheet
■ Placement documents and current authorizations
■ Medical and medication information
■ School and transportation
■ Family contact and visit information
■ Appointments and calendar
■ Expense and mileage records
■ Belongings inventory
■ Factual communication notes
■ Copies of submitted forms and receipts

Privacy safeguards

■ Store the binder in a secure location.
■ Keep Social Security numbers and unnecessary allegations out of routine notes.
■ Use factual, dated observations rather than conclusions or labels.
■ Share information only with authorized members of the child's team.
■ Follow agency retention and destruction requirements.

Weekly review

- Update upcoming appointments and transportation.
- File receipts and reimbursement documentation.
- Confirm medication and refill needs.
- Record completed follow-up tasks.
- Remove duplicate or outdated working copies when permitted.

Key contacts

Caseworker or agency contact

After-hours contact

Medical provider

School contact

Other approved contact

Important: General planning tool only. Follow current agency, court, licensing, medical, and safety instructions. Avoid recording unnecessary confidential information.