File reviews are to be completed once per year.

Early Head Start Master File Review Form - Home Based Model

Family Advocate: _____ Date: _____ Date: _____

Reach Dane Reviewer: Enrollment Dat	re: Child's age:
Folder Contents	Notes/Comments
Yellow Folder: Forms & Enrollment Information	
EHS Application/Income Verification	
EHS Applicant Enrollment	
EHS Enrollment Agreement	
EHS Child Enrollment Information	
 Permission for Video/Photo (update yearly, when expired) 	Expires:
Permission to Transport/Emergency Contact	
EHS Parent Handbook Orientation	
Change of status (is applicable)	
Misc. Release of Info (school, Dane County Human Services, etc.)	
Blue Folder: Health Information	
Section 1 - Authorizations/Permissions (medical, dental, lead, hearing, etc.) • Authorization for Release of medical information • Hospital/birth center (newborn hearing)	Updated yearly. Medical home expires: Hospital/birth center expires: Lead expires:
WI Childhood Lead Poisoning Preservation Program	ND 2 4 6 0 42
Section 2 – Well Child Exams and Immunizations Refer to ChildPlus for most up-to-date status based on individual clinic requirements	NB:2mo:4mo:6mo:9mo:12mo: 15mo: 18mo: 24mo: 30mo: 36mo:
Immunizations record (as needed) Waiver form (if applicable) Growth Charts (as needed/if applicable) Section 3 – Required Follow-up (if applicable) Follow-up documentation (in date order) Nurse notes or ISR's	Refer to ChildPlus for current immunization status information Immunization status: Not UTD at time of enrollment: UTD at time of enrollment: Current status: UTD Complete Other Waiver
Section 4 – Health Forms	
 Health Risk Questionnaire Health Condition Alert Form (annually) Health Action Plan for identified conditions (asthma, allergy, seizure, other) as needed Nutrition Assessment (at enrollment) 	HCAF expires: Type of Action Plan/Expires:
Section 5 – Dental (not required for PIR until age 3) • Examination forms • Follow-up if applicable	Date of most recent dental exam: Follow-up needed: No Yes If yes, date of F/U:
Section 6 – Hearing/Vision screen • Hearing • Vision Section 7 – Nurse Visits (if applicable)	

Folder Contents	Notes/Comments
Green Folder: Family	
Family Profile (at enrollment)	
Family Partnership Agreement (every 3 months)	Date of most recent:
EHS Transport Car Seat Safety	
Home Safety Checklist (at 12 months and/or	
enrollment)	
Pink Folder: Disabilities	
Permission for Release of Information (updated yearly)	
Initial IFSP and Updates (every 6 months)	
Transition plan/IEP is applicable	
Red Folder: Summaries/Logs	
Home Visit Summaries (compare with dates in ChildPlus	
Contact Logs if applicable	
Manila Folder: Development Screening Tools	
Child Development Goals (completed after each	Date of most recent Checkpoint goals:
checkpoint per agency schedule)	
• ASQ:3	
ASQ:SE	
Purple Folder: Services for Pregnant Women	
Pregnancy Services Plan	
Permission for Release of Info (if applicable)	
Pregnancy Health Records	
Nutritional Assessment/Care Plan	
Mental Health Assessment	
Gray Folder: Parent Health (if applicable)	
Mental Health Assessment	
Parent Health or Mental Health Info	