

APPENDIX 1 ASSESSMENT TRACKING SHEET

The Assessment Tracking Sheet is a useful tool to assist teams to keep on top of required Health, Therapeutic and other assessments and evaluations as they occur during the year. This tracking sheet is not meant to be a detailed, exhaustive or historical account of the individual's medical or behavioral history.

Rather, it should include pertinent information which has current implications for planning.

For example, if an individual has seizures, the Neurologist would be listed, as well as when the person was last seen, and when they are due to be seen again. If the Individual had a febrile (fever related) seizure as an infant, twenty years ago- but not since, does not see a Neurologist- there would not be a reason to include this information on the Assessment Tracking Form.

Please see sample Assessment Tracking Sheet below:

INDIVIDUAL'S NAME: John Sample		ISP DATES: <u>7/1/08</u> to <u>6/30/09</u>
Designated Healthcare Coordinator: Nurse June Allison R.N.		LOC DATE: <u>6/1/08</u> Date sent to ISD: <u>5/30/08</u>
Phone: 555-555-5555 x5	Fax: 555-5556	Year LOC Due to NMUR for review: <u>2009</u> Level: <input type="checkbox"/> I <input checked="" type="checkbox"/> II <input type="checkbox"/> III
Date of HAT: <u>5/01/08</u>	HAT LEVEL: <u>II</u>	Date of ABS: <u>5/01/08</u> Date of CIA: <u>5/01/08</u>
Clinical Assessment Areas:		
Assessments	Provider	Results / Implications for Planning:
Physical Exam: Date last done: 4/27/08 Date due Next: Call for lab appt. 9/08 Dr. appt to review lab results- 10/08	Physician: Dr. Ben Casey M.D. 555-5252 fax 555-5253 24 Elm Dr, Center City NM 87777	John is diagnosed with Downs Syndrome, Hypo-Thyroidism & High Cholesterol. His lab tests show his level of Synthroid is fine, and his cholesterol levels are slightly elevated, but within appropriate range (under 160). Dr. discussed raising John's level of activity, and maintaining a diet low in saturated fats. Re-test thyroid and cholesterol in six months. Weight is fine at 160 lbs.
Psychological / BT Assessment: Date last done: 4/10/08 Date due next: 10/08	Provider: Peter Worth, MA. 555-2222 Fax 555-2223 20 Feel Good Way, SFE, NM 87777	Ongoing BT supports, weekly. Current Behavior Support Plan in place, Annual Assessment completed. Peter supports John to express how he feels.
Psychiatric Exam: Date last done: 2/20/1998 Date due next: IDT does not rec.	Psychiatrist: Dr. Carl Jung 555-4444 Vienna Sausage Assoc. Santa Fe, NM 87777	Evaluation by Dr. Jung in 1998, no psychiatric follow-up needed. Mild Anxiety related to communication deficits.
Neurological: Date last done: n/a Date due next: n/a	Neurologist: n/a	No neurological issues requiring evaluation.
Dental: Date last done: 1/10/08 Date due Next: 7/09/08	Dentist: Dr. Steven Clean 222-8888 Fax 222-8887 Clean Dental 12 Smith Rd, SFE NM 87505	Routine cleanings, prophylactic antibiotics prior to dental work- call for prescription 10 days prior to appt. John has routine cleaning and periodic fillings as needed. Wisdom teeth out earlier this year.
Vision: Date last done: 1/24/08 Date due next: 1/09	Provider: Dr. Seeu 555-9999 Fax 555-9998 Seeu Associates 2020 Hwy 5, Espanola, NM 87555	John has Myopia-(nearsighted). He wears prescription glasses with transition lenses. Prescription generally increases every year or two. John needs assistance to keep his glasses clean, and clean them with special cloth to prevent scratches.

Auditory / Hearing: Date last done: 08/10/07 Date due next: 8/09	Provider: Dr. Kaufman 555-3333 Hearing Specialists, LLC 10 Hwy 2A, SFE, NM 87505	John has minor hearing loss in his right ear, Dr. Kaufman states John does not need hearing aids, and some deficit may be due to processing issues, follow every two years. Forward evaluation to SLP
Communication / Speech Therapy: Date last done: 4/08 Date due next: 7/08	Therapist: Julie Earring, SLP. 555-1111 Fax 555-1112 1332 Echo Valley Rd, SFE, NM 87555	John receives weekly SLP. Goals include pronunciation, and improving listening skills. Also, improving John's comfort level with expressing what he wants and needs, especially in group situations. Annual Assessment 4/08, Communication Plan in place.
Augmentative/Assistive Technology Date Reviewed: Due Next:	Therapist: n/a	n/a
Mobility/Adaptive Equipment: Date last done: Date due next:	Therapist: n/a	John has no Mobility issues, is ambulatory.
Physical Therapy: n/a Date last done: Date due next:	Therapist: n/a	John likes to walk, and participates in Special Olympics as well as a neighborhood softball league.
Occupational Therapy: n/a Date last done: Date due next:	Therapist: n/a	No need for OT services
Nutritional: Date last done: 3/1/08 Date due next: 3/09	Nutritionist: Sally Smith, Nutrition, Inc 555-7777 Fax 555-7778 PO Box 2222, SFE, NM 87777	Diet recommendations include healthy choices, which emphasize low-fat, low cholesterol foods, with lots of fiber. John likes fast food, but is learning which fast foods are better than others.
Vocational Assessment: Initial Assessment: 7/2002 Last update: 3/08	Facilitator: Steve Jobs 555-1111 Fax 555-0001 Your Jobs Inc 900 Apple Way, SFE, NM 87777	John had a vocational Profile update this year, as John would like to work more hours- not available at his current job. Also, he would like to work indoors, around computers. Current Voc Profile in place, incorporated into ISP.
Other: Date last done: Date due next	Received from provider: Frequency: n/a	n/a