

OASIS · AT A GLANCE

The binder that could save your family

Nine sections, one three-ring binder, and a rule about writing things down that has settled more disputes than any argument won out loud. Agencies keep their records. Nobody keeps yours.

PILLAR: HOW | COMPANION TO BLOG POST B145 | 2-PAGE BRIEF

9

SECTIONS, ONE BINDER

The structure recommended across special education and disability law resources.

How the binder gets built

COLLECT, SORT, LOG

STAGE 1

Collect what exists

Request records from every school, clinic, and agency that ever served your child. Most of it is legally yours on request.

→

STAGE 2

Sort into nine sections

Medical, education, evaluations, communications log, progress, correspondence, service plans, financial, contacts.

→

STAGE 3

Log every conversation

Date, person, what was said, what was promised. Then send an email confirming it. That email is now evidence.

What the binder decides

THE MOMENT IT PAYS FOR ITSELF

A new professional makes a fresh judgment about your adult child

This happens every time a case manager, assessor, or coordinator turns over. The fork below is the whole reason the binder exists.

A new assessor scores fewer support hours than the last one. Can you produce the prior record in the room?

Yes. Four evaluations, four different years, same findings.

You put them on the table. The outlier has to explain itself instead of you having to. Hours get restored at review, and nobody asks you to justify the binder again.

No. You remember the documents but cannot find them.

The current assessment stands because it is the only document in the room. The decision gets made on incomplete information, which is a meaningful share of bad decisions.

2

Copies of everything, always

One for you, one to leave behind. Agencies lose paper, and almost never on purpose.

4

Rules that make it work

Date everything. Never write on an original. Follow up in writing. Bring two copies.

11

Dollars of office supplies

A three-inch binder and nine tab dividers. That is the entire capital cost.

A BINDER AGAINST AN ASSESSMENT

“

When a new assessor scored Marcus as needing fewer hours, his father Tom opened section three and laid out four evaluations across eight years, all describing the same support needs. He did not raise his voice. The assessor asked for copies. The hours were restored at the next review.

THE RECORD OUTLASTS THE REVIEWER.

THE TAKEAWAY

You will outlast everyone. Case managers turn over, coordinators change agencies, assessors rotate. Over twenty years you are the only continuous archive your adult child has.

TURN THE PAGE

The nine sections and what goes in each, the four habits that keep it alive, and the six-weekend build order.

OASISFORAUTISM.COM · OPEN AUTISM SUPPORT AND INFORMATION SPACE · PAGE 1 OF 2

The nine sections, and what goes in each

BUILD IT IN SIX WEEKENDS

SECTIONS 1-3

The history

- ☐ Medical and diagnostic: diagnoses, reports, hospitalizations
- ☐ Education: every IEP, 504 plan, and transition plan
- ☐ Evaluations: psychological, functional, OT, speech, vocational
- ☐ Keep school evaluations forever, they stay persuasive
- ☐ This is the section that wins hour disputes

SECTIONS 4-6

The running record

- ☐ Communications log: date, person, discussion, promises
- ☐ Progress reports: provider notes, behavior data, goals
- ☐ Correspondence: letters, emails, notices, denials
- ☐ Regression documentation is your strongest evidence
- ☐ Keep every denial, especially the old ones

SECTIONS 7-9

The current file

- ☐ Service plans: every IPOS version with authorizations
- ☐ Financial and benefits: SSI, Medicaid, ABLE, trust, payee
- ☐ Contact directory: name, role, phone, email, dates
- ☐ When someone asks who authorized it in 2019, you have a name
- ☐ Update the directory the day someone changes

THE HABITS

What keeps it alive

- ☐ Date every document the day it arrives
- ☐ Never write on an original, annotate a copy
- ☐ Follow up every verbal conversation in writing
- ☐ Bring two copies of anything you may be asked for
- ☐ Tell one other person where the binder is

BRING ONE PAGE, NOT A BINDER

The confirming email, in four lines

01

The date

Confirming our conversation today, with the date written out.

02

The claim

You said X. Quote it as closely as you can.

03

The next step

I understood the next step to be Y, by Z.

04

The opening

Please correct me if I have this wrong. Corrections are records too.

YOUR MOVE

From a pile of paper to a working record

1

Start the log

Today. Four columns. Ninety seconds an entry.

2

Buy the binder

Three inches, nine tab dividers, labeled.

3

Request records

Every school, clinic, and agency, in writing.

4

File and scan

Paper for meetings, scans backed up off site.

5

Review yearly

Purge duplicates. Tell someone where it lives.

Nobody has ever been penalized for arriving too organized. Plenty of families have been penalized for arriving with a memory and a hope.

SOURCES

Wrightslaw. Organizing your child's special education and disability records. Available at wrightslaw.com.
 Indiana Resource Center for Autism, Indiana Institute on Disability and Community, Indiana University. Family record-keeping resources.
 Special Needs Alliance. Planning and documentation guidance for families of individuals with disabilities.
 Michigan Alliance for Families. Free record, evaluation, and IEP support for Michigan families.

ABOUT THE AUTHOR

JP

Jim Palasty

Jim Palasty is the founder of OASIS for Autism and a single father of an adult autistic daughter in Michigan.