



PC Program Policy #18: Peer Counselor Files

Peer Counselor personal information, payment invoices and counseling forms containing client-identifying information and are all protected under HIPAA guidelines.

PC Files contain:

The PC creates a client folder for each client which contains the following:

- Initial Prenatal Contact Form (if applicable)
- Initial Breastfeeding Contact Form (if applicable)
- SOAP Notes - for all client contacts (even attempted contacts) other than contacts made using the Initial Prenatal and Breastfeeding Contact forms.
- PCs are encouraged to create a client contact sheet to help keep clients contacts organized and when to schedule clients. Check in with LPCC with options that have already been created. [Client List Spreadsheet Example](#)
- Any personal notes, documents, or client contact sheet which is optional

All counseling must be summarized on the counseling forms on the client record in Google Workspace, and NOT on paper records.

A PC folder contains:

The LPCC creates and maintains each individual PC's folder in Google Workspace which contains the following. It doesn't need to be in this order, as the google workspace alphabetizes it; also within each folder, all information is organized in fiscal years:

- **Active (Open) Client folder.**
 - All clients will be identified by Client last name, First initial, FID number
- **Inactive (Closed) Client folder.** Add DCC before FID
 - **Closing a Client Case**, when the client no longer is eligible or needs PC services, please follow the steps below:
 1. Fill out a close case summary link provided by your LPCC
 2. Notify your LPCC and TL/Nutritionist about closed client case
 3. Work with the LPCC regarding transferring, if applicable.
- **PC Invoice folder**, which contains:
 - PC monthly invoices- see [Policy 7 Time Reporting and Documentation](#)
 - PC hourly time tracker- report monthly
- **Training Certificates folder upload the following certifications**