

Creating an Effective Document Management System

I attended a Wrightslaw Seminar by Pete Wright Advocacy Lawyer where he spoke of how to be an effective advocate for your child. I have asked many attorneys over the years if they prefer the Wrights method of filing, and all have said 'Yes'.

The first item that many don't realize is that **ALL** of the paperwork you get bombarded with once you begin your diagnostic journey needs to be in order.

This Document Management System will:

- Make it easier to find a document
- Make it easier for advocating for your child
- Effective if an Advocate or Lawyer is needed

To Begin... You will need:

- ✓ Computer with printer/scanner (the scanner helps with creating a backup file of documents and easy access if you need to send to an attorney for assistance)
- ✓ 3 Ring Binder (5" to 6" binder per school year)
- ✓ 3 Ring Hole Puncher
- ✓ Pencils and Sharpener (or use mechanical pencils)
- ✓ Sticky Notes

As you receive each document, **LIGHTLY and SOFTLY** write the date you received the document in the bottom right hand corner of the 1st page per document. *****This will be the ONLY writing that is allowed on a document*****. If you need to make a notation pertaining to a document write it on a sticky note. **NEVER write on your originals.**

- Documents will be kept in chronological order. Do Not file by category.
- Use the 3 ring hole puncher on documents. Make sure when you punch holes that dates, signatures or any pertinent information isn't compromised.
- Make a Master Document List. (See attached). I also keep a separate log for correspondence (attached).
- Once everything is organized, go back and re-read documents. (read while filing you will never get done).

It is very easy to be overwhelmed with the amount of documents you can receive on a daily process. They can pile up fast so it is best to update your Master File weekly at the least.

Just follow these Four Simple Rules and you will be less stressed.

1. Do not write on your original documents
2. Do not use a marker or highlighter on your original documents
3. Do not release your original documents to anyone
4. Keep your book current

If you have any questions please feel free to ask. We are all here to help one another.

Created by: Stacy Nespoli sdnespoli@gmail.com

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