

# PAT Required Documentation

## Family Files

**Recommended Audit Practice - Monthly**  
(Retained until the child enters kindergarten with exception of records moving into Cumulative Files)

### Recruitment and Enrollment Records

### Family Personal Visit Documentation

- Family Personal Visit Planning Guide
- Family Personal Visit Record
- Developmental Milestones

### Developmental Screening Documentation

- Health Record (transfer)
- Screening Protocol (transfer)
- Screening Summary (transfer)
- Parental Consent, if applicable

### Goal Tracking Records

### Exit Record (transfer)

Note: Additional records may be added to the Family File such as the Family Centered Assessment or other district specific records.

## Program Files

**Recommended Audit Practice - Quarterly**  
(Retained for 5 years)

### Group Connection Documentation

- Group Connection Planning Guide and Record
- Handouts
- Sign-In Sheet
- Group Connection Feedback Form

### Summary of Services

### Community Advisory Committee

- Membership List
- Agendas
- Minutes
- Sign-In Sheets for Attendance

### Supervision Records for Parent Educators

### Professional Development Records for Parent Educators

## Cumulative Files

**Recommended Audit Practice – Annually**  
(Retained until child completes 3<sup>rd</sup> grade)

### Exit Record

### Health Record

### Screening Protocols

### Screening Summaries

## DESE Reporting

### Compliance Plan

### Core Data/MOSIS Reporting

### ePeGs Payment Requests