# 24 Understand Client Filing System

## How to Get a Manager Check-Off

Explain/Demonstrate to the Challenge Center Manager the two different filing systems and how they are used.

## Procedure Details

There are two different file systems for filing Challenge Center client information: Digitally and paper/hard copy.

Digital files live on the P-Drive under *Clients, Itineraries, and Contacts.* Each group will have its own folder. Some groups bring us multiple clients so there may be subfolders with in a folder, for example:

P-Drive -> Clients, Itineraries, Contracts -> Center High School -> Construction Academy

P-Drive -> Clients, Itineraries, Contracts -> Center High School -> CMA Academy

P-Drive -> Clients, Itineraries, Contracts -> CSUS -> RPTA

P-Drive -> Clients, Itineraries, Contracts -> CSCUS -> Student Affairs

These folders are where you will find Original Contracts, Signed Contracts, Revised Contracts, Completed Goals and Expectations Forms, Itineraries, and any other relevant notes. All items should have the program date in the title of the document so they naturally sort from newest to oldest (or vice versa).

Paper files consist of everything that the digital files do, plus Program Summaries. These files are kept in big filing cabinets in the office. All CSUS programs are in their own drawer in alphabetical order by department/professor, or group, while all other client files are listed in alphabetical order in a different filing cabinet.

When a client books a program, their paper folder is pulled from the large filing cabinets and placed in the bottom drawer at the Challenge Center Manager’s desk. This is where a Team Lead should first look when beginning to prepare for an upcoming program. Once all of the prep work is done for a program, the Team Lead will take the file with them and have it at the Challenge Center the day of the program.

Client files can be left in the basket in the Toy Shed after the program is over, along with participant waivers.