

## Checklist

*This is a helpful tool for service coordinators to use as they follow policies and procedures for each activity completed with a family through their journey in early intervention. For more information on policies and procedures please visit the Child and Family Connections Procedure Manual.*

### Contact Family

- File received \_\_\_\_\_
- Date of 1<sup>st</sup> Call \_\_\_\_\_ 2<sup>nd</sup> call \_\_\_\_\_ 3<sup>rd</sup> call \_\_\_\_\_
- 1<sup>st</sup> unable to contact letter \_\_\_\_\_ cc ref. source \_\_\_\_\_
- 2<sup>nd</sup> unable to contact letter \_\_\_\_\_ cc ref. source \_\_\_\_\_
- Closure letter \_\_\_\_\_ cc ref. source \_\_\_\_\_
- Date of Intake \_\_\_\_\_
- Case notes CM04 \_\_\_\_\_

### After Intake

- Enter PA11, PA16, AS01(EI20), Enter 1<sup>st</sup> 2 sections of AS03( strengths, concerns, resources, priorities from Family Assessment)
- Print Master Record, Medical Info, Assess. History 0002, EI20
- Fax Insurance Info to CBO if consent obtained
- Print Allkids from PA42
- Fax prescription request to pediatrician
- Add secondary address PA03-F9
- Contact evaluators \_\_\_\_\_ Date of Eval \_\_\_\_\_
- Mail copy of Family Assessment to family
- Enter auths SV07
- Fax auths, Family Assessment, Consent and Ability to decline service, Release of Info, Consent to collect/store and utilize PII, and birth and medical history to providers
- Set up IFSP meeting

### Eval/Assessment/IFSP

- Waiver of written prior notice signed if eval on same date
- Review strengths priorities, ask parents if priorities and concerns are still the same, do they want to add anything?
- Create Outcomes based on strengths, concerns and priorities (discuss with team how outcomes will be achieved\* be creative outcomes don't belong to disciplines\* make sure strategies are easily understood by parent and/or caregivers. \* Remember outcome 1 needs to be a transition outcome regardless of the child's age.
- Ask parent if there is anything else that may have been missed
- Complete child outcome( parent participation is essential, use decision tree)
- Complete implementation page review services with parent, if parent is in agreement with all services parent checks off consent to all services and signs. If parent does not want some of the services the parent will check off I consent to all services except....the parent would then list what they don't consent to.

- Once meeting is over and providers have left, have parent complete consent to use private insurance, collect proof of income, and have parent sign Family Fee Agreement. (If unsure of what Family Fee will be leave Agreement with parent have parent mail it in to CFC.

#### **Post Eval/IFSP**

- Enter SV01, PA35, and SV07( remember all evaluators must attend meeting in person or on the phone in its entirety **do not give partial meeting auths\* if provider leaves early you do not give a meeting auth at all**)
- CM04 case note meeting making sure to describe results, how outcomes were created, how the child is eligible and list everyone the attended.
- If proof of income has been received, enter in cornerstone PA35 ctf11\*if the family does want to provide income check off highest fee. ( Family is agreeing to pay the maximum fee\* make sure you have the Family Fee Agreement on file if you are choosing this as your option)
- Once reports are received type IFSP and mail copy of all assessments, IFSP to family, pediatrician and entire eval team. Family should also get copy of IFSP letter that writes how the child is eligible, all the services that were agreed upon, and statement about their Family Fee for the IFSP period. Attach the family Fee report to the packet.\* Remember that if you have not added direct services in cornerstone the Family fee will not be activated and you will need to resend it once you enter direct services.
- Once you have prescription, insurance CBO verification (if family chooses to use INS), consent to use private insurance, proof of income, and Family Fee agreement you can add ongoing services.
- Ongoing provider will get copy of IFSP, all evaluations, Prescription, Consent and Ability to Decline services consent, Consent to Collect, Store and Utilize PII, Consent to use Private insurance and front and back of ins card( if applicable), and consent to release info to EI providers

#### **Not eligible/Not Interested in Services**

- Please do not close the day of the evaluation, all auth will end the day before you close the case and providers will not be able to bill for the evaluation.
- Send closure letter along with copies of the evaluations.

#### **Monthly Contact**

- Make sure you contact family monthly and document in case notes, if sending written correspondence reference this in case notes CM04.

#### **Six Month Review**

- Send written notice 1 month prior to due date asking for availability of family and providers. Request that reports are sent in.
- Schedule meeting
- Make copies of all reports for the entire team.
- Hold meeting making sure to review strengths, concerns, priorities, review outcome and write in progress on right hand colum.\* be specific “ progress made\*is not acceptable. State weather outcome is achieved or weather outcome will be continued. Always bring

- justification worksheet with you to six month reviews, frequency/intensity, duration may change during the meeting. If this occurs complete the justification form as a team and get signature. Complete implementation page.
- Enter meeting auths after the meeting SV07 and change follow up date in PA35.
  - Have parent sign Receipt of Notices after you give notices\* If changes are made have parent sign Consent to use insurance( if applicable)

#### **Annual Review**

- Request annual evaluations in writing\* please note that child will need to have global evaluation.
- Schedule meeting
- Make copy of evaluations for everyone on the team
- Redetermine eligibility
- Hold meeting, review priorities, outcomes (write progress on right side of outcome page). Complete child outcomes
- Complete all consents with parent
- Obtain new proof of income, new Family Fee Agreement, new prescription, insurance, and reverify benefits
- Enter PA35, enter meeting auths, and type IFSP
- Mail summary letter, IFSP, evaluations, consents to family and providers. Include Family fee report and send it to family.
- Document in case notes

#### **Transition Conference**

- Schedule with parent and LEA no earlier than 2yrs 6 months and no later than 2yrs9 months
- Complete conference
- Complete tracking form and give to LEA(keep a copy for the file)
- Enter PA34

#### **Exit**

- Schedule 120 days to leaving program, meet as a team and get exit data. Request exit reports
- Enter in AS03 add only answer #8, 9, 10
- Enter meeting auths, mail exit reports to family along with closure letter
- Close case. If you have not received tracking form back from LEA request it and document in case notes