
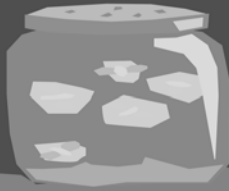


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Service Coordination  
Orientation Training  
(SC101)



Module Six –  
Ongoing Service  
Coordination

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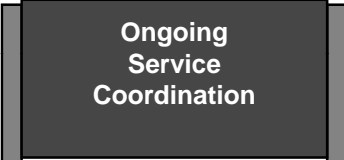
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Welcome



Ongoing  
Service  
Coordination

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Supplemental Materials

<b>Participant Material</b>	
<b>PowerPoint Slides</b>	
<b>3-ring binder</b>	

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First Steps

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## Training Objectives

- Understand the role and responsibilities of the ongoing service coordinator in the First Steps System
- Know the documentation that is required to be completed during each process of the First Steps System
- Know the timelines associated with each process of the First Steps System for which the intake coordinator and ongoing service coordinator are held accountable

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First Steps

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## Coordinating/Supporting the IFSP Team – Ongoing Communication

<b>Family: Concerns, Priorities, Resources</b>		
Service Coordinator	Direct Service Provider(s)	Lead ED Team member

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## Ongoing Communication

- Responding to families
  - Listen to and support the family
  - Refer the family to other agencies
  - Visit the family to assist them in resolving the issue or concern
  - Visit the child in the hospital
  - Revisit the IFSP based on new information
  - Communicate to other team members regarding changes that might occur

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### Ongoing Communication – with other IFSP team members

Ongoing Service Coordinator  
Family  
Direct Service Provider

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### Coordinating/Supporting the IFSP Team – Planning

Service Coordinator  
Family  
Direct Service Provider(s)

← Planning ensures family's concerns, priorities, resources are met →

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### Planning Resources

- Baby Jane Smith timeline
- Print the timeline
- View the Attachments

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System Point of Entry and Local Planning and Coordinating Councils

Service Coordinator

Transition and Quarterly Tracking Tool

**Web Object Placeholder**  
 Address: <http://www.firststeps.in.gov>  
 v  
 Displayed in: Articulate Player  
 Window size: 320 X 240

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**Changing Providers**

- Changing Providers
  - Ongoing SC speaks with family first to discuss issues and concerns and work toward resolution
- Ongoing SC helps family choose new provider
- If new provider chosen, ongoing SC
  - Contacts existing provider
  - Contacts newly chosen provider
  - Completes the Changes to the IFSP form (51841)
  - Send Change Page to SPOE and all other team members

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**Changing Service Coordinators**

- Family contacts SPOE
- Each SPOE determines who will work to resolve the issue
- If SC changes
  - SPOE assigns new SC
  - SC immediately ceases contact with family
  - SC must act in best interest of family

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First Steps

## 1<sup>st</sup> Quarterly Home Visit – Initial IFSP

- Ongoing service coordinator must have face-to-face meeting with family at least once a quarter
- If ongoing SC attended IFSP meeting, this counts for first quarterly visit for initial IFSP
- Ongoing SC must call family within 1<sup>st</sup> quarter to assess services
- If ongoing SC did not attend IFSP meeting, must have face-to-face visit within the first quarter

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## 1<sup>st</sup> Quarterly Home Visit – Annual IFSP

- Attendance at IFSP Annual Review meeting does not count as 1<sup>st</sup> quarterly home visit
- Ongoing SC must have face-to-face visit with family within 3 months of start date listed on IFSP

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First Steps

## 1<sup>st</sup> Quarterly Home Visit – Providing Family Support

**Items to discuss**

- Questions family has about First Steps
- Role of direct service provider and service coordinator
- Outcomes written on IFSP
- Transition issues
- Any other programs that might be helpful – Hoosier Healthwise, WIC, CSHCS, Family to Family, etc.

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## Shadowing Direct Service Providers

<b>Observe</b>	Therapy sessions during first quarter
<b>Learn</b>	About child's diagnosis
<b>Develop</b>	Relationship with other IFSP team members

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[After user has completed quiz](#)  
[At any time](#)

Properties...      Edit in Quizmaker

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## About Module 6

<b>Steps</b> <b>Processes</b> <b>Philosophies</b>	<b>Training Manual - Reference</b>	<b>Module 6 – step-by-step instructions</b>
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## Six-month IFSP Review – preparing for the meeting

- Schedule the meeting
- Send out 10-day prior, written notice to everyone on IFSP team
- Obtain feedback from the ED Team

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## 6<sup>th</sup>-Month IFSP Review

 Meeting Agenda

- Review family rights and procedural safeguards
- Complete the 6-month packet of forms
  - 6 Month Review Cover Sheet
  - Outcome Review
  - Request for Authorization/Meeting Minutes
  - Family Information Update (if necessary)

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## 6<sup>th</sup>-Month IFSP Review (continued)

 Agenda (continued)

- Review progress towards outcome; add any new if appropriate
- Review appropriateness of services
- Review cost participation
- Review transition
- Complete meeting minutes

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### After the 6<sup>th</sup>-month IFSP Review Meeting

- Obtain physician's signature on Changes to the IFSP
- Send copies of the physician signed Changes to the IFSP form to all team members.

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### 3<sup>rd</sup> Quarterly Home Visit

- Used to prepare for the annual IFSP review/eligibility re-determination meeting
- Prior to the visit:
  - Contact the family and have them gather supporting documentation for cost participation
    - Current pay stubs or updated income verification
    - Current insurance card

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### During the 3<sup>rd</sup> Quarterly Home Visit

- First part of the visit:
  - Focus on the parents
    - Ask about child's progress
    - Ask if family has issues or concerns that need addressed
    - Ask them if any changes have occurred to the family

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## Preparing for annual IFSP/ Eligibility Re-Determination Meeting

- Second part of the visit:
  - Focus on the IFSP
  - Prepare for the annual IFSP review and annual eligibility re-determination

See pages 11 and 12 in Participant Materials for detailed list of planning steps.

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## Between 3<sup>rd</sup> Quarterly Visit and Annual IFSP Review Meeting

- Request ED Team evaluation
  - Ideally, evaluation completed 30-45 days before annual IFSP date
- Referral Forms – SPOE specific
  - Completed by ongoing SC
  - Sent to ED Team scheduler along with signed copy of parent's permission to assess
- ED Team Scheduler sends completed forms to ED Team

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## Between 3<sup>rd</sup> Quarterly Visit and Annual IFSP Review Meeting

•Send Physician's Health Summary to child's physician

•ED Team completes the evaluation  
•ED Team sends its report to ongoing SC

•Ongoing SC copies ED Team report and signed copy of Physician's Health Summary  
•Sends both to all members of IFSP team

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## Eligibility/IFSP Annual Review Meeting

- Introduction of all attendees
- Discuss intent of meeting
  - Discuss child's potential eligibility
  - Discuss information from ED Team assessment
  - Insure family understands its rights and responsibilities
- Entire ED Team report discussed by ED Team member
- Eligibility is discussed

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## Eligibility/IFSP Annual Review Meeting

- If child is found eligible
  - Complete First Steps Part C Eligibility Determination Statement      State Form 50054
  - Obtain signatures on determination form
    - Parents
    - Ongoing service coordinator
    - All other team members
    - Physician and ED Team members – "Per Report"
  - Identify two areas of discipline
  - Complete Request for Authorization/Meeting Minutes      State Form 51839

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## Eligibility/IFSP Annual Review Meeting

- If the child is found not eligible
  - Complete the First Steps Part C Eligibility Determination Statement      State Form 50054
  - Discuss transition options with family
  - Complete exit interview
  - Complete Request for Authorization/Meeting Minutes      State Form 51839

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## Eligibility/IFSP Annual Review Meeting – IFSP Development

- IFSP Meeting
  - Review family rights and procedural safeguards
  - Provide any information family requested
  - Write a new IFSP
  - Complete cost participation forms – generate computer CP form showing family's co-pay
  - Complete Request for Authorization/Meeting Minutes
  - Complete Request for Authorization for Eligibility Determination (ED Team) set up length of IFSP

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## Eligibility/IFSP Annual Review Meeting – After the Meeting

- Obtain Physician's signature on IFSP
  - Must be obtained within 10 days of parent's signature
- Copy and distribute physician signed IFSP and all IFSP paperwork to all team members
- Submit all required documentation to SPOE

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## Changes to the IFSP

- Adding a new service
- Increasing a frequency or intensity of service
- Decreasing a frequency or intensity of service
- Terminating a service

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## Adding a New Service

1. Direct service provider completes Request for Change or Addition in Service with ED Team Response
2. Ongoing SC reviews request; signs the form
3. Sends completed, signed form to ED Team
4. Lead ED Team member reviews proposed changes
5. ED Team member responds with 5 working days

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## ED Team Supports Addition of Service

1. IFSP team meets with family
2. If team approves, ongoing SC completes Changes to the IFSP
3. Ongoing SC gets physician's signature
4. Sends 10-day prior, written notice to family and direct service provider
5. Sends documentation to SPOE
6. Submit documentation to all IFSP team members

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### ED Team Denies Support of Addition of Services

1. Ongoing SC shares all information with all members of IFSP team
2. IFSP team holds a meeting to discuss ED Team report
3. If IFSP team agrees with ED Team findings, ongoing SC documents this and sends all documents to SPOE
4. If IFSP team disagrees with ED Team findings, ongoing SC schedules an IFSP review meeting, which will include evaluation.

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### ED Team Denies Addition of Services after IFSP review

1. Ongoing SC reviews with the family the procedural safeguards which include due process

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### Increasing Services to the IFSP

1. Direct service provider provides written justification for increase
2. Ongoing SC sends copy to all IFSP team members and ED Team
3. Schedules a team discussion meeting
4. Holds the discussion
5. Determine if increase is necessary

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## Increasing Services to IFSP

6. Send out 10-day prior, written notice
7. Meet with family
8. Complete First Steps Documentation of Team Discussion
9. Obtain signatures on Changes to the IFSP form
  - Parent
  - Ongoing SC
  - Physician
10. Send copies of all documents to IFSP team
11. Send originals of all documents to SPOE

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## Decreasing/Terminating Services – Direct Service Provider

1. DSP submits written justification to ongoing SC
2. Ongoing SC sends document to all team members
3. Schedules/holds team discussion
4. Determines if decrease/termination is appropriate

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## Decreasing/Terminating Services – Direct Service Provider

5. Ongoing SC sends out 10-day prior, written notice to all team members
6. Meet with family
7. Complete Changes to the IFSP
8. Complete First Steps Documentation of Team Discussion
9. Obtain signature on Changes to IFSP
  - Parent
  - Ongoing Service Coordinator
10. Copy documents and send to all IFSP team members
11. Send document originals to SPOE

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## Terminating Services

1. Ongoing SC completes Changes to the IFSP from
2. Obtains signatures
  - Parents
  - Ongoing service coordinator
3. Completes exit interview
4. Completes Ongoing Record Termination

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## Documentation for Decrease/Termination

1. Complete Service Change to IFSP Checklist form      State Form 51921
2. Sends all documentation mentioned previously to SPOE

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## Decrease/Termination of Services – Implemented by Family

1. No team approval needed
2. Ongoing SC completes Changes to the IFSP form
3. Obtain signatures
  - Family
  - Ongoing service coordinator
4. Complete Ongoing Record Termination
5. Complete exit interview

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## Family Moves out of Cluster

-  Give families information about new Cluster SPOE
-  Contact new Cluster SPOE to inform them of new arrival
-  Complete Documentation of Child Transfer to Another County State Form 52000
-  Send child's EI file to new Cluster SPOE

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## Family Moves out of State

-  Obtain information about new state's EI system and share with family
-  Inform family of different eligibility definition in new state (if applicable)
-  Contact new state's EI referral point
-  Copy and send child's information as needed, with consent

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## Assistive Technology

- Intended to help achieve the outcomes listed on the IFSP
- Lending library
- Assistive Technology Approved List

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## AT Items and Prior Approval

### Prior Approval

On the list – no PA needed	Non on the list – PA needed
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## Assistive Technology not requiring PA

Please read 22 in  
Participant Material

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## Assistive Technology Requiring PA

**Please read pages 22-23 in Participant Material**

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## Assistive Technology Buyout Program

<p>Families transitioning out of First Steps may purchase their child's AT items</p>	<p><a href="http://www.firststeps.in.gov">www.firststeps.in.gov</a> Policy and Oversight Information Policy Information AT Buyout Methodology</p>
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## Audiology

**Please read pages 24-25 in Participant Material**

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## Reporting Suspected Child Abuse

-  Mandatory reporters
-  Indiana law
-  1-800-800-5556
-  <http://www.in.gov/dcs/protection>

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## Documentation

**If it isn't documented,  
it didn't happen.**

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## Service Coordinator Progress Reports

For each child on caseload	Tell story of services and support and child's progress	Every contact with and on behalf of child and family to be documented	Objective, Factual Non-judgmental
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## Documentation – Basic Elements

<ul style="list-style-type: none"> <li>■ Name of recipient and date of birth</li> <li>■ Full names and titles</li> <li>■ Location of services</li> <li>■ Date of entry for each entry</li> </ul>	<ul style="list-style-type: none"> <li>■ Description of activity and service coordinator's follow up</li> <li>■ Signature and title of service provider – individual entries must be signed or initialed by the service coordinator</li> </ul>
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## Documentation – Characteristics of Good Notes

<ul style="list-style-type: none"> <li>■ Entry is legible</li> <li>■ No lines are left blank between entries</li> <li>■ Late entries are identified with "Late Entry"</li> <li>■ People discussed are identified</li> <li>■ Notes are grammatically clear and correct</li> <li>■ Clichés are avoided</li> </ul>	<ul style="list-style-type: none"> <li>■ Use blue or black ink</li> <li>■ Errors are noted with a single line through and initialed</li> <li>■ No white or black out of words</li> <li>■ Limit the use of abbreviations</li> <li>■ If abbreviations are used, use of abbreviations are identified</li> <li>■ Use precise language – i.e. use prefer instead of has a preference for; use please instead of I would appreciate it if</li> </ul>
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## Items to Document

<ul style="list-style-type: none"> <li>■ Telephone messages received or left</li> <li>■ Instructions to family</li> <li>■ 30-day start date</li> <li>■ Discussions about procedural safeguards</li> <li>■ Discussions about cost participation</li> </ul>	<ul style="list-style-type: none"> <li>■ Discussions or interactions with family members relevant to IFSP or IFSP planning</li> <li>■ Discussions or interactions with provider relevant to child or IFSP planning</li> <li>■ Summary of visits with               <ul style="list-style-type: none"> <li>Families</li> <li>Providers</li> <li>Community agencies or resources</li> </ul> </li> </ul>
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## Documentation Tidbits

- Consider documentation as part of the job, not an afterthought
- Original progress notes (not copies of) become part of child's EI record
- Family's confidential information – encourage family to share with rest of team
- If won't, document that family discussed personal situation

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## Documentation Forms and Requirements

SPOE specific	Ask SC supervisor
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## Early Intervention Record

- All original documentation, forms and signatures are kept in EI paper file
- SPOE personnel maintain the record
- Ongoing SC is responsible for assuring record is complete
- Ongoing SC must review records quarterly
- Each record must have Access Log

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## Strategies for Organizing Job

-  Resources
-  Transition packet for families
-  Categories of paperwork
-  Standardize letters, agenda, memos
-  Current phone numbers, fax numbers, addresses
-  Directory of parents, providers, agencies, other resources
-  Use calendars/tracking tools
-  Discard all unneeded paperwork

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## Summary

**Day-to-day activities of ongoing service coordinator**

**Timelines accompanying ongoing service coordination activities**

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**PROPERTIES**

On passing, 'Finish' button: Goes to Next Slide Properties...

On failing, 'Finish' button: Goes to Next Slide Edit in Quizmaker

Allow user to leave quiz: After user has completed quiz

User may view slides after quiz: At any time

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## Application Station

- Complete all assignments in the Application Station located at the end of your Participant Materials.
- Further details are provided with the exercises.

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**Goodbye**

- This is the end of Module Six of the Service Coordination Orientation Training (SC101).
- Thank you for participating.
- Last module: Transition

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