

# Checklist for 45-day Timeline Activities

Revised June 2020

## Week 1: Referral/Intake

### Referral:

- Send *Acknowledgement of Referral Letter* to referral source, if not parent referral
- Establish a hard copy EI record with a record access log
- Initial contact with parent
  - Educational surrogate or Translator needed?
- Schedule Intake Visit
- Option: mail *Meeting Notification Letter* to family

### Intake Visit:

- Explain the First Steps program
- Share First Steps brochures
- Parental Rights Statement*
- System of Payments*
- Obtain enrollment information
  - Option: Complete Page 1 of Intake Information Worksheet
- Notice of Action/Consent for Evaluation/Initial Assessment of the Child*
- Consent to Use MO HealthNet/Medicaid*
- Obtain birth history and developmental information
  - Option: Complete Page 2-3 of Intake Information Worksheet
- Obtain *Releases of Information (ROI)*, as needed
  - Referral source
  - Doctor/Hospital/Specialists
  - PAT
  - School district (if child is near 2 ½ years old)
  - Newborn Hearing Screening, if applicable, and send to DESE
- Data Entry:**
  - Referral information
  - Intake information
  - Case note contacts with family

## Week 2-3: Complete the Evaluation of the child

- Request documentation with ROI
  - *Health Summary*
  - Medical records
  - PAT, etc.
- Contact provider to arrange DAYC-2
- Data Entry:**
  - Enter DAYC-2 request
  - Enter DAYC-2 authorization

- Weekly case notes of contacts with family and/or providers, attempts to obtain medical records, etc.

## Week 4: Eligibility Determination

- Collect and review all documentation to determine eligibility, (including the evaluation of the child and medical record)
- Contact family regarding eligibility
- Data Entry:**
  - Eligibility determination
  - Ongoing Service Coordinator assignment, if eligible
  - Case note contacts with family and providers regarding eligibility

### If Ineligible for First Steps:

- Contact family regarding the child's ineligibility
- Mail *Ineligible for First Steps Letter* to family, including:
  - Notice of Action/Ineligible for First Steps Program*
  - Parental Rights Statement*
  - Eligibility Criteria*
    - Copy of the evaluation report
    - Local resources (EHS, PAT, ECSE, etc.)
- Data Entry:**
  - Case note discussion with family regarding ineligibility
  - Verify all required authorizations entered
  - Inactivate record as "Part C Ineligible"

## Week 5: Initial IFSP Planning

- Discuss with family:
  - Schedule additional assessments as needed
  - Option: Family Assessment Interview as a separate visit
- Schedule IFSP meeting with family and IFSP team
- Send *Meeting Notification for Initial IFSP* with eligibility statement to family, including:
  - *Parental Rights Statement*
  - Copy of evaluation and/or assessment reports
- Notify IFSP team of meeting
- Data Entry:**
  - IFSP Meeting Planner

- Case note contacts with family and providers on scheduling, meeting information, etc.

## Week 6: Initial IFSP Development

- Complete Family Assessment Interview prior to IFSP meeting
- Facilitate IFSP meeting
  - Health and Medical (including vision and hearing)
  - Present Levels of Development in Daily Routines and Activities
  - Review of Family Assessment
  - Outcomes - Child and Family
  - Strategies and Activities
  - Services and Supports
    - Primary Provider, and if applicable:
    - Supporting Provider(s)
    - Ancillary Provider(s)
  - Natural Environment Justification, if applicable
  - Other Services and Supports
  - Team Communications
  - Transition
- Parental Rights Statement*
- Notice of Action/Consent for Initiation of EI Services*
- System of Payments*
- Financial Information for Family Cost Participation*
- Consent to Use Private Insurance*
- Complete ECO Rating

### After Initial IFSP Meeting:

- ASAP: Identify provider(s) as indicated in the IFSP
- Data Entry:**
  - ASAP: Finalize IFSP team meeting attendance
  - Case note IFSP meeting details
  - Enter ECO Entry Rating
  - Within 14 days of meeting, finalize the entire IFSP
  - Case note date copy of IFSP sent to family, and if applicable, ECSE, PAT or other non-enrolled team member
  - Enter Compliance Note if Exceeded 45 Days
- Send IFSP to family, including:
  - Copies of all signed forms
  - Copy of Monthly Fee Determination (MFD)