Service Coordination Online Training

Workbook

EITP

EARLY INTERVENTION
TRAINING PROGRAM

Service Coordination Online Training
Webinars

Webinar Dates

The dates and link for joining the webinar are included in your registration email. Write your dates below to help remember!

Topic: *Date:*
1. Initial Referral and Intake   _____
2. Evaluation/Assessment/Eligibility   _____
3. Initial IFSP   _____
4. Monitoring the IFSP & Transition Planning _____

Questions I Have for Webinars:

Resources and Notes from the Webinars:

Section 1: Introduction to Service Coordination

Links and resources for this course section can be found at the following:

http://go.illinois.edu/SCOnline1

Section 1 Outline

Module 1: Early Intervention

       Early Intervention: What is EI?

       Vision, Mission and Purpose of EI

       Federal Legislation

       Part C Revisions 2011

Module 2: Foundations of EI

       People First Language

       Key Terms and Themes in EI

       A Shared Vision of EI

Module 3: National and State Perspectives

       Federal Statue and Regulations for SC

       Desired Outcomes for SC

       Desired Skills and Qualities of SCs

Module 4: SC Then and Now

       Evolution of Programs Supporting Families

       Functions of SC

Closing Summary

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

Defining Early Intervention

Before defining Early Intervention (EI), take a few minutes to reflect on what brought you to EI and how you would define EI.   After answering the questions, return to the presentation and press play.

1. What motivated you to pursue a position as a service coordinator?

2. When a friend or family member asks about your new job, how do you describe EI to them?

3. Based on what you know about your SC position at this point, how would you describe your role in EI?

Early Intervention is…

📋 Optional Activity: Exploring People First Language

Visit the library on the *Disability is Natural* website at http://www.disabilityisnatural.com/library.html and find at least one article that interests you.

When you have finished reading the article(s), please answer the following questions as they relate to what you read and learned:

1. What is the title(s) of the article(s) you read?

2. What is one lesson you learned from the article(s)?

3. How will you share what you learned with other service coordinators, team members, and families you serve?

✓ *As a reminder, if you want to take the People First Language Pledge, please visit the following link to download your pledge (PDF):* http://www.disabilityisnatural.com/images/PDF/pfl-pledgecol.pdf

Matching Key Terms & Themes in EI

For this activity, which is found on the next page, please draw a line between a key term and the matching definition. For example, there is a line connecting the term "system" and the definition for "system". You can check in with your supervisor or onsite trainer if you have any questions about these terms or themes.

Term	Definition
System	A belief that the family is the constant in a child's life, the most important source of information about a child, and the greatest influence on a child during the early years
Family - Centered	A group of diverse but interrelated elements comprising a unified whole
Culturally Competent	A means of bringing efforts together to achieve a common goal working together in a smooth concerted way.
Coordinated	A mixture of more than one professional discipline
Comprehensive	An ability to understand, communicate with and effectively interact with people across cultures. It requires self-awareness of culture and attitudes toward cultural differences, knowledge of different cultural practices, and application of cross-cultural skills.
Multidisciplinary	Children ages birth to three years of age (36 months).
Interagency	The routine activities of the child's everyday life in the home and community where early intervention supports are provided
Infants and Toddler	A specific group of people that may be made up of partners, children, parents, aunts, uncles, cousins and grandparents
Family	Covering a broad scope
Natural Environments	Active participation in routine activities in a way that makes sense for the child and activity
Engagement	Work between and among agencies.

To proof your work, you can visit the Service Coordination Online Answer Key available at https://illinois.edu/blog/view/6150/344642 Then, return to the course and press play.

▷ Defining Early Intervention – A Reflection on Your Definition

Based on what you've learned in this module so far, is there anything you would change or add to what you wrote earlier in Activity 1 "Define Early Intervention"?

Take a moment to review what you wrote in the box for the "Defining Early Intervention" activity on page 4. Then, write down any additions or changes to your original definition within the box. After you have finished, you may return to the course and start the next presentation.

▷ Level of Agreement with Key Principles

Review the key principles stated below and determine your level of agreement for each statement.

KEY PRINCIPLES	Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
1. Infants and toddlers learn best through everyday experiences and interactions with familiar people in familiar contexts.	○	○	○	○	○
2. All families, with the necessary supports and resources, can enhance their children's learning and development.	○	○	○	○	○
3. The primary role of a service provider in early intervention is to work with and support family members and caregivers in children's lives.	○	○	○	○	○
4. The early intervention process, from initial contacts through transition, must be dynamic and individualized to reflect the child's and family members' preferences, learning styles and cultural beliefs.	○	○	○	○	○
5. IFSP outcomes must be functional and based on children's and families' needs and family-identified priorities.	○	○	○	○	○
6. The family's priorities, needs and interests are addressed most appropriately by a primary provider who represents and receives team and community support.	○	○	○	○	○
7. Interventions with young children and family members must be based on explicit principles, validated practices, best available research, and relevant laws and regulations.	○	○	○	○	○

It can help to review and discuss these principles with your supervisor or on-site trainer, especially if there are any you disagree with or don't fully understand. They can help put these in context of your role as a service coordinator and also provide insight based on years of experience in the field.

▷ **Discovering Existing Family Supports**

How will you find out what supports a family already has in place? What questions would you ask of the family? Are there people and/or places you might ask the family about to help you learn more about their formal and informal supports?

Take a minute to write down some questions you might ask a family.

▷ **What Makes an Effective Service Coordinator?**

Based on what you know about your role and the desired outcomes of service coordination, what skills would service coordinators need to be effective in their role? Write the skills within the box below.

_____

_____

_____

_____

_____

_____

_____

_____

_____

Then, reflect on those skills you wrote and what is in this course.

1. **Which of these skills are your strengths?** ⭐ Put a star next to the skills written in the box that you have!

2. **Are there any other skills or strengths you would like to develop?**

3. **Who can help you grow as a Service Coordinator?**

✓ *When you have completed this activity, please return to the presentation and press play. You may also want to review your response and any questions you have with your supervisor or onsite trainer.*

Module: SC Then and Now	Functions of Service Coordination

▷ Using the SC Checklists

Please download and review the checklists from the following link, if you have not already:

https://illinois.edu/blog/files/6039/114592/4633.pdf

When you have finished reviewing the checklists, please complete the following:

1. Write down the title of one checklist that you found to be particularly helpful as you learn about the functions of service coordination and your responsibilities as a service coordinator.

2. Please check in with your trainer or supervisor at your CFC to see if there are any checklists that would complement and/or augment the checklists.

✓ *When you have completed this activity, please return to the presentation and press play.*

Reflection of Knowledge & Skills

Inevitably, someone will ask you about working in early intervention! It could be a friend, your neighbor or a new family you are working with in early intervention. **If you were to explain what early intervention is, what are the key elements you would include?**

Take a moment to consider your definition of early intervention from page 4 and jot down any additions or changes you would make to the definition on page 4 or in the space below.

Please return to the presentation and press play to continue.

Reflection on Laws, Key Principles and Recommended Practices in EI

Part I: Reflect on what you learned about in section 1 regarding the federal law and evidence based practices in early intervention. Identify any follow up questions you might have about the legislation, Mission and Key Principles, and/or the Division for Early Childhood Recommended Practices (DEC RPs).

If you need a refresher, review the links related to this activity:

- **Federal Legislation: IDEA, Part C, 303.126 Early Intervention Services in Natural Environments:** Please note this link is very long, so please access link from listing at http://go.illinois.edu/SConline1
- **Agreed Upon Mission & Key Principles for Providing Early Intervention Services in Natural Environments:** http://ectacenter.org/~pdfs/topics/families/Finalmissionandprinciples3_11_08.pdf
- **Division for Early Childhood Recommended Practices (DEC RPs):** http://www.dec-sped.org/recommendedpractices

Please document your follow up questions in the table below:

My Questions about **Federal Legislation**

My Questions about **the Mission and Key Principles**

My Questions about **the DEC Recommended Practices5**

✓ *Please proceed to Part II of this activity and remember to review your follow up questions with your supervisor, if you still have questions after completing Part II.*

Part II: Please review each row in the table below and identify the key theme for each row.

Resource	Selection from the Resource	Key Theme(s) Identified
Federal Legislation	*Natural environments* means settings that are natural or typical for a same-aged infant or toddler without a disability, may include the home or community settings, and must be consistent with the provisions of §303.126.	
Mission and Key Principles	*Principle 1:* Infants and toddlers learn best through everyday experiences and interactions with familiar people in familiar contexts.	
DEC Recommended Practices	*Taken from the "Environments" RPs* E1: Practitioners provide services and supports in natural and inclusive environments during daily routines and activities to promote the child's access to and participation in learning experiences. E3: Practitioners work with the family and other adults to modify and adapt the physical, social, and temporal environments to promote each child's access to and participation in learning experiences.	

1. What do you believe to be the key theme and/or message being reinforced across each of these guiding resources?

2. How might Federal Legislation, Agreed upon Mission and Key Principles and the DEC Recommended Practices impact the work you do in your role as a service coordinator?

Federal Legislation, the Agreed Upon Mission and Key Principles and the DEC RPs are resources that complement and reinforce one another as they guide and support legislation, the philosophical base for what early intervention is, and what it looks like in practice.

3. Please remember to review your responses and any unanswered questions with your supervisor or onsite trainer.

▷ Reflection on Your Skills and Strengths

Please reflect on your skills, strengths, and needs for your role as a Service Coordinator at this point in the training. Please review your responses with your supervisor or onsite trainer and see how they might provide extra support, or if they can direct you to some additional resources, where you feel it is needed.

1. What are the skills and strengths you will bring to your role?

2. What responsibilities or areas of your role are unclear at this time? Where do you feel you need extra support?

✅ Check-in

Section 1 provided a lot of foundational information about service coordination and you are in the process of learning a lot in training and on the job. At this point in time, please rate your understanding of this section.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1 2 3 4 5

5 means you are very confident in your understanding of the desired skills/qualifications and/or functions of service coordination. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5, on how well you understand the following:

a. **The desired skills, qualifications of service coordination** _____

b. **The functions of service coordination** _____

⏳ *There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention.*

Section 2: Early Intervention in Illinois

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline2

Section 2 Outline

Module 1: Overview of Illinois EI System

        Mission, Vision and Principles in EI

        Lead Agency in Illinois

        Community Partners

        Funding EI in Illinois

Module 2: Service Coordination in Illinois

        Illinois Service Coordination Model

        SC Qualifications and Desired Skills

        Data Systems and Record Keeping

Module 3: Individualizing SC

        Working with Families

        Building Relationships

        Communication and Key Considerations

Module 4: Getting Families into the System

        Child Find and Public Awareness

        Referrals to EI

        Connecting to Families

Module 5: Family Rights and Procedural Safeguards

        Family Rights

        Procedural Safeguards

        Privacy Practices

        Rights and Confidentiality Practices

        Advocacy

Closing Summary

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

Fact or Fiction

Please review the following statements and indicate if the statement is fact or fiction. Then, return to the presentation. After the answers are revealed cross out the incorrect portion of the statement and replace with wording that makes the statement a fact.

Statement	Fact	Fiction
The Illinois EI system provides family-centered intervention which is coordinated, collaborative, culturally-sensitive and competent, comprehensive and; effective in assisting families to help their children reach their fullest potential.	○	○
The vision of the IL EI system is to identify all children age birth-three who are exhibiting delays or are at risk of developing delays in the emergence of developmental skills.	○	○
The needs of infants, toddlers and their families require the perspective of one main discipline.	○	○
Early intervention therapists/providers are the most important participants in the Early Intervention system.	○	○
Early Intervention provides services of the highest quality possible that are appropriate to meet the needs of children and their families.	○	○

Please review any questions you have about these statements and the Key Principles of EI with your supervisor and/or trainer. When you have completed this activity please return to the presentation.

Who Can Help Me?

Please answer the following "who can help me?" questions by responding with an Illinois agency listed in the answer bank. (The agencies can be used more than once). A website for each agency is provided as a resource. Once you have completed this activity you may want to review it with your supervisor or trainer to check for understanding, identify additional resources, and/or address any follow up questions you have.

Illinois Agencies	Website
☐ Child and Family Connections (CFC)	http://www.wiu.edu/ProviderConnections/links/
☐ Central Billing Office (CBO)	http://eicbo.info/
☐ Department of Human Services (DHS)	http://www.dhs.state.il.us/page.aspx?item=31889
☐ Early Intervention Clearinghouse	http://eiclearinghouse.org/
☐ Early Intervention Evaluators/Providers	http://www.wiu.edu/ProviderConnections/credentialing/
☐ Early Intervention Monitoring	http://www.earlyinterventionmonitoring.org/
☐ Early Intervention Training Program (EITP)	http://eitp.education.illinois.edu/
☐ Provider Connections	http://www.wiu.edu/ProviderConnections/

1. I have a question about my credential requirements. **Who can help me?**

2. I would like to attend other trainings to learn more about working with families in the IL EI System. **Who can help me?**

3. I want to find resources, materials and books that I can share with the families I serve or that help with my professional development. **Who can help me?**

4. I need to direct a provider to someone who can answer their questions about billing procedures. **Who can help me?**

5. I have a copy of the procedure manual, but I wanted find an electronic copy of it and the links for procedures and resources it references, as well as other manuals. **Who can help me?**

6. The records I keep might be reviewed by someone other than my supervisor or CFC and I want to ensure they include all the required components. **Who can help me?**

7. I need to contact someone to help complete an initial evaluation and provide subsequent early intervention services. **Who can help me?**

8. I need to find additional information about the different roles and descriptions of the early intervention providers. **Who can help me?**

9. I just met a family who said they may be moving to another part of the state. I would like to get more information about the CFC offices in other parts of the state and the regions that they serve, so I know what CFC can support this family. **Who can help me?**

10. I want to stay informed about what is happening in the IL EI system. I heard that some agencies offer a newsletter to share updates, and I want to sign up for them. **Who can help me?**

Please remember to review any outstanding questions you have with your supervisor or as there may be multiple answers to some of these questions. When you are ready, please return to the presentation and press play.

▷ **Identifying Community Partners**

Write down a few questions you could ask a family to help identify the partners a family is utilizing or wanting to use. When you have finished, please return to presentation.

⊘ *You may want to review your questions with a peer and/or manager to see what is best!*

Examples

- **Community programs**
- **Recreational activities**
- **Clubs**
- **Churches**
- **Workshops**
- **Play groups**
- **Food pantries**
- **Libraries**
- **WIC**
- **Specialized Care for Children (SCC)**

▷ **Identifying CFC Partners**

Identify who is in each role at your CFC office and what resources are available through each service. Please check in with your supervisor or trainer if you need assistance with this activity.

Role	Who is in this role at your CFC? Full name(s)	Contact Information (Email and/or phone)	Resources Available
Parent Liaison			
LIC Coordinator			
Social Emotional Consultant			
Develop-mental Pediatric Consultant			

▷ **Reflective Supervision**

Ask your supervisor if there is an opportunity for reflective supervision at your CFC (individually or in a group). Note any opportunities in the space below or separate sheet of paper, and return to the presentation.

▷ **Vstone Practice**

Once you are assigned your Cornerstone login ID to use with the Vstone system, practice logging in and navigating the different menu options.

💬 You may want to pair up with your supervisor or another service coordinator that is assisting you in your training activities for you to observe and assist you during your practice activities.

👤 **Make sure you have a copy of all the Vstone screen flow sheets**. You can check with your supervisor and/or onsite trainer to find the sheets you need to help navigate the system.

▷ **"Take a Walk in Their Shoes" Reflection**

Read the article "Take a Walk in Their Shoes" by Kathie Snow and answer the following questions. A link to the article can be found within the presentation or at **http://go.illinois.edu/SCOnline2**. When you have finished the activity, please return to the presentation.

Was there anything in this article that surprised you?

What strategies will best help you empower and support the unique families you serve?

Is It Appropriate?

Classify the activities listed as *appropriate, sometimes appropriate*, or *never appropriate* for service coordination, by circling one of the options below each activity. As you evaluate each item, consider what you've learned so far about families, positive assisting and professional boundaries.

Drive parents to appointments	Sit at the kitchen table	Request to turn the TV off during appointments	Give the family food, toys or clothes	Accept food or drink offered by the family
Appropriate	Appropriate	Appropriate	Appropriate	Appropriate
Sometimes	Sometimes	Sometimes	Sometimes	Sometimes
Never	Never	Never	Never	Never

If you have questions or concerns about any activity listed, please discuss them with your supervisor or trainer. When you have finished this activity, please return to the presentation and press play.

"A Small Footprint" Reflection

Please take a few minutes to read the article titled "A Small Footprint" by Kathie Snow and answer the following questions.

> A link to the article can be found in the presentation titled Building Relationships or via the following link: **http://go.illinois.edu/SCOnline2**.

1. In your upcoming role as a service coordinator, what can you do to ensure you are providing the necessary information and supports to families you serve while leaving a small footprint behind?

2. What are some obstacles that may make leaving a small footprint challenging in this role? To answer this question, it may help to consider the impact of a family's expectations of what EI is and is not.

3. How could you overcome those challenges?

✓ *Review your responses with a supervisor and/or peer to learn how they find ways to partner with families while leaving a "small footprint" behind. When you have finished with the activity please return to the next coursel in the training.*

▷ Referrals at Your CFC

Identify who completes the referral activities in your office. If you have responsibilities related to referral activities please list them in the space provided below.

Who completes the referrals in your office?

If applicable, what are your specific responsibilities related to referral activities?

✓ *Now spend some time reviewing and practicing the activities you will be responsible for with the support of a supervisor or onsite trainer.   When you have completed this activity, please return to the next course in this training.*

▷ SC Assignments at Your CFC

Check with your office to learn how service coordination assignment works in the office you work out of. When you are finished with this activity please return to the presentation and press play.

Family Rights

Please follow the steps below and complete all components to the best of your ability. Since this activity has steps that may require additional time, you may want to finish the presentation before finishing this activity.

☐ **Download The Illinois Early Intervention Program: A Guide for Families if you have not already.**

> *Please remember that the guide is available in English and Spanish. Both versions are available in this coursel and at http://go.illinois.edu/SCOnline2.*

☐ **Find the section on legal rights within the guide.**

☐ **Think about how you would explain these rights to the family. Maybe you have observed another service coordinator deliver this information to a family already. If so, you may want to draw upon what you learned when you observed your peer.**

☐ **When you are ready, write a script for how you would introduce rights to a family who is entering early intervention.**

> *You can do this on separate sheet of paper or type it into a Word document, if you like.*

☐ **Practice your script by saying it out loud a few times. If you find yourself stumbling in one place or another, you can make changes to your script until you feel confident and comfortable using it.**

☐ **Find a peer and share your script for constructive feedback. This is an important step to making sure your script is understood by others and providing correct information.**

☐ **Modify your script based on the feedback, if necessary.**

☐ **Practice your script as needed. Once you have a caseload assigned, you can use it as a support while delivering family rights to new families you meet!**

Explaining HIPAA and FERPA

Please use the space provided below to make some notes that will help you explain HIPAA and FERPA to families. Remember to refer back to the coursel on Privacy Practices if you would like to review additional resources on HIPAA and FERPA, which may help develop your responses.

Imagine you are meeting with a new family in EI, and need to explain HIPAA and FERPA to them. Think about how you would explain these laws.

This is how I would explain HIPAA...

These are the things that HIPAA protects…

This is how I would explain FERPA…

When you have finished, please check with your supervisor or trainer for any additional training on privacy practices that may be required by your CFC office. Then, when you are ready, please return to the training and complete the next course in this section.

State Support through Partnering Entities

List at least one way that each of these Illinois agencies and programs will support you in your role as a service coordinator.

State of Illinois Agency or Program	Supports offered to Service Coordinators
Department of Human Services (DHS)	
Child and Family Connections (CFC)	
Early Intervention Clearinghouse	
Early Intervention Monitoring Program	
Early Intervention Training Program (EITP)	
Provider Connections	
Central Billing Office	
Early Intervention Evaluators/Providers	

Community Partners

Answer the following questions and complete the table below to help you learn more about the partners available in your community.

What will you do to learn more about the various community partners that may serve and support families in your area?

Why is it important to have information about the resources in the communities that you serve?

List some partners in your area related to the following:

Type of Community Partner	Partner(s) available in your area
Community Programs	
Recreational Activities	
Clubs	
Places of worship	
Workshops	
Playgroups	
Food Pantries	
Libraries	
Lending Libraries	
WIC	
Specialized Care for Children (SCC)	
All Kids	

✅ Check-in

Section 2 provided foundational information about family rights and you were able to practice how to share this information with families.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1 2 3 4 5

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5 on each of the following:

a. **Understanding of family rights** _____

b. **Ability to explain family rights** _____

c. **Ability to answer questions on family rights** _____

d. **Recognizing if/when family rights are violated** _____

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention.

This concludes the workbook activities for Section 2. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.

Section 3: Intake and Family Assessment

Links and resources for this course section can be found at the following:

http://go.illinois.edu/SCOnline3

Section 3 Outline

Module 1: Intake Preparation

       Family-Professional Partnership

       First Contacts – What Happens

       First Contacts – Information Exchange

       Planning and Scheduling the Intake

       Intake Preparation-Gathering Info

       Intake Preparation – Sharing Info

       Consent Forms

Module 2: Intake Visit

       Intake Activities – Sharing the EI Philosophy

       Intake Activities – Sharing Publications

       Intake Conversation Starters

       Intake Activities – Gathering Info

Module 3: Family Assessment

       Family Assessment – Federal & State Regulations

       Importance of Family Assessment

       Impact of Family Assessment

       Introducing the RBI and Gaining Consent

       Developing Your Interview Skills

       Conducting the Routines Based Interview (RBI)

       Summarize & Plan Next Steps

Module 4: Documentation

       Documenting Intake Activities

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

Understanding the Family Professional Partnership

Please identify the knowledge and skills a family may have that will be important for a successful partnership and journey through early intervention. Then consider what knowledge and skills you bring to this partnership.

What families bring to the partnership:	What I bring as a Service Coordinator to the partnership:

When you are finished with this activity please return to the presentation and press play. Please also remember to review your completed activity with your supervisor or trainer.

Sharing Information and Resources with Families

Please revisit or recall the resources that you know about that might help you share information with a family about the purpose of early intervention and/or the philosophy of early intervention. Then, identify one resource you might want to direct the family to if they wanted to review some of this information in preparation for your initial visit or following your first contacts with them.

_____

Resource to share with families

⊘ When you have finished with this activity please review your response with a supervisor or trainer and return to the next course in the training.

▷ Recognizing Required Information

This activity will help you identify what information you will need <u>before meeting the family</u>. Below is a list of information that may or may not be collected prior to meeting with the family for the initial intake visit. If the information is required before meeting the family, write "yes" in the appropriate column. Then, determine if that information listed is something that is collected and/or documented on the referral form that is used by your office. Write "yes" if there is a place to document the required information on the referral form and write "no" if the information is not listed on the referral form.

Once you have completed both columns you may determine the gaps between what is required and what is collected on the referral form. This will inform you of what, if any, additional information that should be discussed and gathered from the family prior to the first meeting with the family.

Information that may or may be collected prior to meeting with the family:	Is this information required before I meet with the family? *Yes or No*	Is this information on the referral form? *Yes or No*
Family's Consent to Proceed		
Child's Social Security Number		
Family's Address		
Reason for Referral		
Race/Ethnicity		
Child's Physician		
Child's Medical Records		
Child's Diagnosis (if applicable)		
Family Insurance Information		
Child's Age		
Name of Child's Legal Guardian		
Child's Medical Records		

⊘ Please remember to review your responses with a supervisor or trainer and return to the next course in the training.

Ask Service Coordinators about Intake Planning and Scheduling

Talk to at least two service coordinators and ask them how they plan ahead in their schedule to allow for intake visits to be scheduled with new families in a timely manner. Also find out how much time they typically allow for in their schedule for intake visits.

For example, do they block off a few mornings and a few afternoons each week to allow for scheduling intakes? Or do they block off a full day or two each week to leave room for intake visits that may need to be scheduled?

1st Service Coordinator (name and date) _____ _____

2nd Service Coordinator (name and date) _____ _____

What I learned about planning and scheduling intake visits:

Please remember to review your responses with a supervisor or trainer and return to the next course in the training.

Understanding the Tools used to Gather Information

Please familiarize yourself with the following tools you will use to gather information from families during the initial visit with them:

☐   RBI-SAFER

☐   ASQ-SE or ASQ-SE2

☐   Pregnancy and Birth Information found in the electronic data system Vstone

☐   Intake/Social History Summary Sheet

❗ *If you are not sure where to find or access this information, then please check with your supervisor.*

As you review the tools, please identify any components that you have questions about. For example, you may have questions about terminology in the pregnancy and birth information or you may have some concerns about the best way to go about discussing highly sensitive and private information.

Questions I have about the tools:

?

?

?

?

?

Please note it will take time and practice to develop your interviewing skills. It is important to know which questions might be hard for you to ask, so you can practice asking them and observe how others gather the very same information from the families they serve.

Things I need to practice include:

People I discussed my questions with and/or observed using these tools include:

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

Organizing and Preparing for Intake Visits

Please talk to at least two of your fellow service coordinators and learn about what they to do help them organize and prepare the information that they need to bring to an initial visit. Find out if they use a checklist and/or have a prepared packet and decide if this organizational strategy is something you would like to try.

1st Service Coordinator (name and date) _____   _____

2nd Service Coordinator (name and date) _____   _____

Strategies I would like to try include:

Please remember to review your responses with a supervisor or trainer and return to the next course in the training.

Understanding the Consent Forms

Spend some time familiarizing yourself with the language in the consent forms. Then complete the following activities:

PART 1: Read through the consent forms and make a note or circle directly on the forms anything you don't understand. You can ask your supervisor what it means.

Remember, if you don't understand what it means you won't be able to explain it to the family.

Questions I have about the consent forms:

[?]

[?]

[?]

[?]

[?]

[?]

PART 2: Observe at least two other service coordinators deliver this information to a family. Make notes about what they highlighted in their discussions and what you liked about their delivery. This will help you figure out the best way to share all this information with families.

1st Service Coordinator (name and date) _____   _____

2nd Service Coordinator (name and date) _____   _____

PART 3: After completing Parts 1 and 2, please practice explaining what you would say to a family with one of your peers or your supervisor.

Who I practiced explaining the consent forms to (name and date)

_____   _____

Please remember to review your responses with a supervisor or trainer and return to the next course in the training.

Understanding What to Highlight for Families

Take some time to locate and review each of the resources listed below. Then make notes to yourself about the key information and/or pages that you might want to highlight with a family during your initial visit with them. Please note any questions you have about the resources listed and bring them to your supervisor and/or your peers so you can get the support you need.

The Illinois Early Intervention Program: A Guide for Families

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Family Rights booklet

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Systems of Payment Information

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Parent Liaisons

⭐ Key Pages and Things to Note:	Questions I Have (if any):

EI Clearinghouse Brochure

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Transition Workbook/DVD (Where Will I Be When I'm 3?)

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Educational Rights and Responsibilities

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Do You Have Questions about your Child's Development brochure

⭐ Key Pages and Things to Note:	Questions I Have (if any):

Look What I Can Do Developmental Chart

⭐ Key Pages and Things to Note:	Questions I Have (if any):

⭐ Key Pages and Things to Note:	Questions I Have (if any):

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

▷ Describing EI and the EI Philosophy

Reflect for a minute on the following conversation starter about how EI works.

Early Intervention is here to work with you in achieving the goals you want for your child and family. I will be your service coordinator and I am looking forward to getting to know you and your child so that we can provide you the support you need.

Because infants and toddlers learn from what happens every day, it will be important to build on those everyday experiences. Therefore I will ask a lot of questions about your family routines so I know the best way to support you. Then, together we can determine who else we may need to be part of our team and/or what other community resources may be of interest to you.

Does this feel like something you could practice and use as part of your introduction with families as you lay the foundation of what early intervention is all about for them?

If so, find a peer to rehearse it with. If not, take a few minutes and write your own introduction that highlights the family centered routines based approach, the family professional partnership, and the team approach to intervention.

Person I rehearsed with (name/date)

_____ _____

My "conversation starter"

(if you made changes and created your own conversation starter please use the space below to script it out)

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

Is It OK to Ask?

Take a few minutes and review the following questions and document which ones you think are ok to ask and which ones are not appropriate to ask families.

Is it ok to ask?	Yes or No?
Do you live in a safe neighborhood?	
Are there any health concerns or issues?	
What do you think is wrong with your child?	
How many pregnancies and/or abortions have you had?	
Do you have health insurance?	
What can you tell me about your child that will help me get to know him or her better?	

When you are finished with this activity please return to the presentation and press play.

Guidance from the DEC RP's

The DEC RP's have seven topic areas with one of them focused on Family. In order to make a connection between your role as a service coordinator and the evidence based guidance that the DEC RP's provide in this topic area we would like you to complete a brief reflection activity. Please download the DEC RP's via the link below and review the Family topic area (pages 9-10). Then, when you are ready you may respond to the questions that follow.

http://www.dec-sped.org/recommendedpractices

The first recommended practice under the "Family" topic area is as follows:

> **F1. Practitioners build trusting and respectful partnerships with the family through interactions that are sensitive and responsive to cultural, linguistic, and socioeconomic diversity.**

Think about what you know about your role in those early conversations and meetings with families (first call to schedule the intake and the intake appointment with family assessment).

Please identify 3 concrete things that you can do to begin to build a trusting and respectful partnership with the family.

1

2

3

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

▷ **Describing the Benefits of Family Assessment**

Based on what you have learned and perhaps what you may have already observed from watching other service coordinators during their initial visits with families, please take a moment to think about all the benefits from completing a Routines Based Interview. Then consider how you would share those benefits with the family when obtaining consent to complete the Family Assessment. Lastly, practice your own delivery of this with your supervisor or trainer.

Benefits of Family Assessment and RBI	Key Talking Points to Highlight with a Family When Obtaining Consent for Family Assessment

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

▷ Responding to Family's Questions

Please make note of any questions you think families might have and/or list any questions you have heard families ask of service coordinators. For example, if you think a family might ask "why is this necessary?" or "does my spouse (or partner) need to be present for this?", then you should take this time to consider and practice responses to the questions you anticipate. Then, review these questions and discuss your potential responses with your supervisor so you can be prepared to answer any questions a family may have for you.

Possible Questions from Families (including ones you've heard from visits you observed)	Potential Responses to Questions from Families

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

▷ Practice Your Interviewing Skills

Please review the questions on the RBI-SAFER and on the EISR. Then, practice asking the questions with a colleague, friend, or a family member. Use this time to practice becoming familiar with the questions. Remember to stay open minded in order to allow the person's responses to guide your follow-up questions.

This is also a good time to practice how and where you are going to document all that you are learning from the interview. While capturing the information, be sure that your note taking does not interfere with the interview you are conducting.

Person Interviewed _____ _____ _____
<div align="center">Name of person   Relationship to you   Date completed</div>

Person Interviewed _____ _____ _____
<div align="center">Name of person   Relationship to you   Date completed</div>

"Aha Moments" During Practice Interview*

*Reflect on your interview skills. *For example, aha moments may include "I did much better than I thought", or "I have identified some key places that I stumbled and would like to practice some more".*

Please remember to review your responses with a supervisor or trainer and return to the next course in the training.

Identify Key Talking Points during Summary of Intake Visit

Identify some key talking points that you would want to highlight with the family as you summarize an intake visit and the next steps for the family. Utilize what you learned from this training and your observations of your peers to make this list and then practice your delivery with your supervisor or trainer.

Key Talking Points

☐

☐

☐

☐

☐

☐

☐

✓ Please remember to review your responses with a supervisor or trainer and return to the next course in the training.

Same Case Note

Please review the sample case note found below. Make note of the level of detail and any questions that you have about what is included.

! While there are certainly rules of thumb for documentation, each CFC office may have their own style of documentation and it will be important for you to follow up with your supervisor or trainer with any follow up questions or clarifications.

SAMPLE CASE NOTE:

EI

This writer completed intake in the family's home with mom (parent's name) provided mom with an overview of the Early Intervention system and gave parent Early Intervention: A guide for Families. Parental rights were also reviewed with the parent and parent was given a copy of The State of Illinois Infant /Toddler and Family Rights under IDEA for the Early

Intervention System. Parental Consent and Ability to Decline Services was reviewed with mom and she gave consent for a Family assessment and Consented for an initial evaluation. Completed Routine Based Interview, ASQ-SE, and birth and medical history with parent. Summarized information with parent on Family Assessment form and entered in section 1 of AS03.   The following are the child and family's strengths, concerns, and priorities (insert list of priorities here). Discussed EI Evaluators and Natural environments with mom and she picked the following providers. Reviewed and gave parent notice of Confidentiality Practices and parent signed consent to Collect, Store, and Utilize PII. Parent signed releases of information to/from Pediatrician (list name), EI Providers (list each one), and Chicago Public Schools. Mom signed Social Security Disclosure, declining to give her social security number. All Kids/DSCC screening was completed with parent and child may be eligible for DSCC, Parent signed release of information so this writer can make a referral to DSCC.

The mom was given the following notices: Child and Family Connections Notice of System of Payments and Fees, Family Participation Program Fact Sheet. Reviewed both documents with parent highlighting the services that are subject to fees and services provided at no cost. Reviewed the family Fee calculation and informed parent what documents would be needed for proof of income, reviewed The Family Fee Agreement and left it with parent. Reviewed the use of insurance and discussed benefits of using insurance. Parent signed Consent to use Private benefits. Mom signed Child and Family Connections Acknowledgement of Receipt of Notices. Acknowledging that she received all the notices.

Informed parent that this writer would send her and initial evaluators copy of family assessment.

Name/SC

In the space below, please write any questions or notes you have about this sample case note.

When you are finished making notes and identifying questions, please return to the presentation and press play. Please note you will be prompted to respond to some reflection questions about this sample case note when you return to the presentation.

Please remember to review any questions you have with a supervisor or trainer and return to the presentation and press play when you are ready to respond to some reflective questions about this sample case note.

Approved Abbreviations

Please review the sample list of approved abbreviations with your supervisor and update the list according to what is or isn't approved to use by your CFC. *Remember to include name of person connected to the abbreviation (if applicable) when case noting with an abbreviation (i.e. Sue Jones, PT).*

Acronyms	Acronym Definition
CBO	Central Billing Office
D/C	Discharge
DCFS	Department of Child and Family Services
DHS, IDHS	Department of Human Services, may also appear as IDHS (Illinois Dept. of Human Services)
DSCC	Division of Specialized Care for Children
DT	Developmental Therapist
DTH	Developmental Therapist - Hearing
DTV	Developmental Therapist – Vision
DX	Diagnosis
EC	Early Childhood
EI	Early Intervention
IFSP	Individual Family Service Plan
LCPC	Licensed Clinical Professional Counselor
LCSW	Licensed Clinical Social Worker
LIC	Local Interagency Council
LM	Left Message
LSW	Licensed Social Worker
MDX	Medical Diagnosis
OT, COTA	Occupational Therapist, Certified Occupational Therapy Assistant
PC	Phone Call
PM	Program Manager
Psych	Psychologist
PT	Physical Therapist
PTA	Physical Therapist Assistant
PCP	Primary Care Nurse
RBI	Routines Based Interview
RN	Registered Nurse
RX	Prescription
SC	Service Coordinator
SD	School District
SE	Social Emotional
SES	Social Emotional Specialist
SLP	Speech Language Pathologist
ST	Speech Therapist
STA	Speech Therapy Assistant
SX	Surgery
TW	This Writer
TX	Treatment
VM	Voice Mail

Other Acronyms?	Definition

⊘ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

▷ ## General Guidelines for Documentation

Please review the general guidelines for documentation and make note of any questions you have about what is expected of you in your case notes. Review any follow up questions you have with your supervisor or trainer.

General Guidelines for Documentation

➢ Document all contacts made and all activities completed on behalf of the family and child which includes telephone calls (leaving message with another person or on voice mail, no answer, number disconnected), face to face meetings, and written correspondence.

➢ Use case notes to provide essential information that is not contained in meeting record forms such as the IFSP.

➢ Document reasons for cancellations (whether cancelled by the provider or the family) any time a contact was scheduled and did not occur.

➢ Provide complete and accurate information regarding the contact or activity, ensuring that a third party can read the case note and understand what occurred

➢ Record events and observations in a factual, non-judgmental way and avoid subjective comments.

➢ Use positive statements

➢ Use language understood by all team members, including the family, avoid jargon or explain it in note.

➢ Complete case notes in a timely manner

In the space below, please write any questions or notes you have about these guidelines.

⊘ *Please remember to review your questions with a supervisor or trainer and return to the next course.*

Write the Wrongs

Please review the following statements. Evaluate what is wrong with the statement and rewrite them so they follow the tips and guidelines you have been taught to follow when documenting activities and/or discussions.

Statement	Write the Wrong by revising this statement to say:
1. Sara's phycal needs, not to mention nutrition are poor. It is not being attended to adequately.	
2. Mr. & Mrs. T. & John & Linda & even their grand mother have repeatedly told me how much they wanna Joseph to get more therapy.	
3. Mrs. Robert is passive-aggressive, withholding, manipulative and narcissistic.	
4. Jamie has speech problems. Unlike her twin, Mary is developing normally.	
5. Completed Intake	
6. Sent insurance information to service providers.	
7. Rcd. m/f mom, r/t call, n/a, lmsg.	

✓ *Please remember to review your responses with a supervisor or trainer and return to the next course in the training.*

Practice Documenting Family Assessment Information

Observe a service coordinator during an initial visit with a family and practice documenting information gathering and documenting.

- ☐ Bring your own copy of the RBI and Intake Social History Summary form with you when you go and observe.
- ☐ Follow along and take notes as you would if you were the one conducting the interview.
- ☐ Practice summarizing the information that you would document on the summary form.
- ☐ After the initial intake meeting, review your notes and documentation with your peer.
- ☐ See how your version compares with what they documented on the RBI and summary form.
- ☐ Document the name of at least one person you observed and compared your documentation with in this workbook.
- ☐ If questions arise about what to include or what not to include please follow up with your supervisor for clarification and additional instruction.

Service Coordinator who I observed and compared notes with:

_____ _____
Name   Date

Additional Questions I Have about Documenting Family Assessment Information:

✓ _Please remember to review your questions with a supervisor or trainer and return to the next course in the training._

▷ # Recognizing and Navigating Vstone Screens

As a Service Coordinator you will rely on the electronic Vstone system to document a number of intake activities. It is important for you to understand how to navigate in and out of the different screens and the importance of gathering and documenting information in the appropriate place.

Please observe at least two service coordinators as they navigate the Vstone system to capture the information collected during the initial visit. Then use the space provided to answer some questions about what information belongs on the following screens and why it is important to gather this information.

1st Service Coordinator (name and date) _____ _____

2nd Service Coordinator (name and date) _____ _____

VStone Screens

PA16 Household Members

Important and unique info to review document:

Special notes about navigating or completing screen?

AS01 Assessment (EI20 Pregnancy & Birth Information Assessment)

Important and unique info to review document:

Special notes about navigating or completing screen?

PA11 Birth Data

Important and unique info to review document:

Special notes about navigating or completing screen?

CM04 Case Notes

Important and unique info to review document:

Special notes about navigating or completing screen?

CM04 Case Notes

Important and unique info to review document:

Special notes about navigating or completing screen?

✓ *Please remember to review any questions with a supervisor or trainer and return to the next course in the training.*

▷ **Practice Running Vstone Reports**

Information found in the following electronic reports will supplement the RBI summary form and ASQ: SE (or ASQ: SE2) summary. With the help of your supervisor, practice running these reports, or observe another service coordinator running the reports for a family that you observed for the initial visit. Then review the reports and answer questions listed below.

Vstone Report Name	How will this information help with the summary of info shared with the evaluators?	What is the fast path and/or steps to get to this report?
Participant Master Record **HSPR0201**		

Vstone Report Name	How will this information help with the summary of info shared with the evaluators?	What is the fast path and/or steps to get to this report?
Participant Medical Information **HSPR0202**		
Assessment History **HSPR0207** *** Assess Type Initial Referral Form Questions (0002)**		
Assessment History **HSPR0207** *** Assess Type Pregnancy and Birth (EI20)**		
What questions, if any, do you have about the purpose of these reports and/or the information gathered in them? 		

Please remember to review any questions with a supervisor or trainer and return to the next course in the training.

Reflecting on What Evaluators Will Need

Based on the information you gathered during the initial visit with the family, consider what types of information evaluators might need. Take a few minutes and reflect on the family assessment information and reports that you learned to run from Vstone. Then make a list of all the things you think will be important to share with evaluators in the space provided in your workbook.

What information will evaluators need?

◯✓ *After you have finished this activity, please return to the next course in the training.*

Module: Post Intake Activities   **Authorizations**

▷ Evaluation Authorization Observations

Observe at least two other service coordinators entering evaluation authorizations and write their name and time of observation in the space below. Then answer the question about identifying providers for evaluations. Lastly, complete the "Evaluation Authorizations – Pop Quiz".

1ˢᵗ Service Coordinator Observed (name and date) _____ _____

2ⁿᵈ Service Coordinator Observed (name and date) _____ _____

> **Did you learn how to identify which providers are qualified to complete initial evaluations and therefore hold an "evaluator" credential?**
>
> ☐ Yes ☐ No ☐ Not sure

Evaluation Authorizations – Pop Quiz

Please review the following questions and answer them to the best of your ability. If you are uncertain about any of your responses please revisit this course for a refresher.

1. **What screen in Vstone do you visit to enter authorizations?**

---

2. **What "type" of authorization would you need to enter when there is no IFSP in place and it is still the "intake benefit period" in Vstone?**

    a. Evaluation

    b. Assessment

3. **Please list three reasons the "place of service" field in the authorization so important?**

    1.

    2.

    3.

4. **Evaluation authorizations are typically entered for how many minutes?**

5. **How many days are authorizations issued for?**

    a. 7 days

    b. 10 days

    c. 14 days

    d. As long as the evaluator needs

Please remember to review your answers with a supervisor or trainer and return to the next course in the training.

Section 3 Summary	A Reflection on Section 3

▷ Family Professional Partnership

Please list at least two benefits of the family professional partnership that you would highlight for a family when you meet with them for the first time and explain the EI Philosophy.

1

2

Optional: Other Benefits

▷ Intake Preparation Activities

Please list at least two intake preparation activities you learned from this training or through your observations of other service coordinators that you would like to implement. For example, you could put "creating an intake packet so you have all the necessary paperwork at your fingertips when you need it".

> **1**

> **2**

> **Optional: Other Activities**

▷ Refining Your Interview Skills

Please identify at least two strategies you plan to use to help refine your interviewing skills.

> **1**

> **2**

> **Optional: Other Strategies**

▷ Connect to Evidence Based Practices

In this section you reviewed the DEC Recommended Practices (*www.dec-sped.org/recommendedpractices)* and completed a reflection activity pertaining to the first recommended practice in the topic area that focuses on Family (F1. Practitioners build trusting and respectful partnerships with the family through interactions that are sensitive and responsive to cultural, linguistic, and socioeconomic diversity.)

Now that you have gained additional information about your role in the initial intake and family assessment process, what other practices do you relate to under the "Family" topic area or any other topic area listed in the DEC RP's?

You can respond by printing out the RP's and circling all the ones you resonate with or list them in the space below with the letter and corresponding number (i.e. F1). If you do not print it out, please write the letter and number corresponding to the RP in the space below.

Intake Flowchart

Please review the Intake Flowchart on the following page or for a "stand alone" version of the flowchart in a single document available at the following links:

http://illinois.edu/blog/files/6150/364271/88776.pdf or http://go.illinois.edu/SCOnline3

Remember to bring the flowchart with you as you observe other service coordinators and make notes on it as you identify the following:

☐ Things you like   ☐Things you don't like   ☐Questions about the flow of things

As you learn more about the flow of activities that occur with intake you can refine this flowchart to better meet your needs.

Check-in

Section 3 provided foundational information about intake and family assessment.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1 2 3 4 5

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5 on each of the following:

a. **Understanding of the family-professional partnership** _____

b. **Ability to explain the EI Philosophy to families** _____

c. **Ability to answer questions about consent forms** _____

d. **Ability to conduct a family assessment** _____

e. **Ability to enter evaluation authorizations.** _____

f. **Ability to document information gathered in Vstone.** _____

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention.

This concludes the workbook activities for Section 3. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.

Intake Flowchart

Philosophy of Early Intervention & Early Intervention Consents

Including Child and Family Connections Consent and Ability to Decline Services

↓

Intake/Social History Summary Form

Complete Sections 1 through 6

↓

ASQ-SE (or ASQ-SE2)

↓

Child and Family Connections Consent and Ability to Decline Services

Consented to complete Family Assessment?

YES →

NO →

YES branch

Complete Routines Based Interview using **RBI SAFER Combo**

↓

Recap Routines Based Interview

↓

Intake/Social History Summary Form

Complete section IV based on information collected from RBI with parent and discussion of disciplines evaluating child

NO branch

Intake/Social History Summary Form

Complete Section 7 by directly asking caregiver the questions

↓

Discussion about disciplines evaluating the child

Intake/Social History Summary Form
Shared with family and initial evaluators

Section 4: Illinois Systems of Payment

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline4

Section 4 Outline

Module 1: Notice of System of Payments and Fees

       Overview of Fund Sources

       Introduction to Private Insurance

       Introduction to Public Insurance

       Introduction to Family Fees

       Acknowledgement of Receipt

Module 2: Private Insurance

       Utilizing Private Insurance

       Benefit Verification

       Benefits of Participating in Early Intervention

       Insurance Exemptions

       Insurance Impact on Family Fees

       Insurance Waivers

       Talking Points on Insurance

Module 3: Private Insurance Consents & Scenarios

       Informed Consent for Insurance Use

       Private Insurance Consent Forms

       Insurance Waiver Scenario

       Insurance Family Fee Scenario

Module 4: Public Insurance

       All Kids

       Informing Families with Public Insurance

       Consent to Use Public Benefits

       All Kids Scenario

Module 5:   Family Fee

        Family Fee as a Fund Source (OPTIONAL)

        Family Participation Fee Program Fact Sheet

        Invoices, Billing Options, Delinquency & Reconciliation

        Family Fee Payment Agreement

        Talking Points on Family Fee

Closing Summary

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

Practice Explaining the Notice of System of Payments and Fees

For this activity, you will practice introducing and explaining each item on the Notice of System of Payments and Fees as you would when you first meet with a family. Think about your delivery of this information and how you may have observed other service coordinators sharing this information with families. Consider if you will review each item one by one and what sort of examples and/or feedback you plan to share as you review the importance and impact of each item in this notice.

When you are ready, take a few minutes to practice your delivery of this information with a peer and/or your supervisor. Then document who you practiced this with and the date you completed the activity in the space provided. If you have any follow up questions please review those with your supervisor or onsite trainer and return to the next course when you are ready.

Who supported me with this activity?

_____   _____
                                             Name   Date Completed

Please review any questions you have with your supervisor and/or trainer. When you have completed this activity please return to the presentation.

Reviewing Benefit Verification

Part 1: Please ask your supervisor, onsite trainer and/or a peer to show you the benefit verification (BV) form for at least two different families with private insurance.

- ☐ Consider what you learned about the covered benefits and any restrictions that might apply for each of the examples you review. Be sure to ask questions about things you do not understand.
- ☐ Identify the fields on the completed BV that give you valuable information or fields that might be need information from you in the future.
- ☐ Think about the following questions as you review each example:

Is this a type of plan that will likely have restrictions on it such as a HMO would? (Yes or No)

Example 1:   Example 2:

Is there a lifetime max? If so, is it something that might be in jeopardy if EI services are billed?

Example 1:

Example 2:

Does the BV indicate that a referral is required? If so, what would you do next?

Example 1:

Example 2:

Are there provider restrictions? If so, what else would you need to know about this and what next steps would you take based on the example you reviewed?

Example 1:

Example 2:

Did the CBO representative leave any comments? If so, what did you learn from them and what next steps might you need to take?

Example 1:

Example 2:

⊘ *Review your responses with your supervisor, onsite trainer, and/or peer who is supporting you with this activity.*

Part 2: Please reflect on what you learned from each example you reviewed in Part 1 and document who supported you with this activity and the date that it was completed in the space provided here in your workbook.

Example 1: Things I learned from this example and the next steps that need taken for this example includes the following:

Questions I still have (if any):

<div style="border:1px solid #aaa; border-radius:8px; padding:10px;">

Who supported me with this activity?

_____ _____
NameDate Completed

</div>

Example 2: **Things I learned from this example and the next steps that need taken for this example includes the following:**

Questions I still have (if any):

<div style="border:1px solid #aaa; border-radius:8px; padding:10px;">

Who supported me with this activity?

_____ _____
NameDate Completed

</div>

When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.

▷ ## Explaining the Benefits of EI

Please take a few minutes and reflect on what you have already learned about the use of insurance and the benefits of participating in the EI program. Then, use the space provided below to document how you might respond to the following example of a valid question that a family may ask during an initial intake visit:

"Why should we even bother participating in EI if we already have private health insurance to address our concerns and you plan to bill that insurance anyway?"

✓ *When you have finished with this activity please return the presentation and press play.*

▷ ## Reviewing Insurance Exemptions

Please ask your supervisor, onsite trainer and/or a peer to show you an example for each form or exemption listed in the table.

As you go through each type of form or exemption, make sure you review the additional forms that are required to support documentation when an exemption request is made.

Form or Exemption	Any additional forms or documentation needed?	Questions I have
Benefit Verification form		
Insurance Exemption Request form that has been filled out with the required documentation		

Service Authorizations in Vstone for provider <u>with authorization connected to an approved insurance exemption</u>		
Insurance Exemption Request Approved due to Individually Purchased/Non Group Plan		
Insurance Exemption Request Approved due to Lifetime Cap		
Insurance Exemption Request Approved due to Tax Savings Plan		

Who supported me with this activity?

_____ _____
<div align="center">Name</div> <div align="center">Date Completed</div>

 When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Reviewing Insurance Waivers

Please ask your supervisor, onsite trainer and/or a peer to show you the following items related to each type of waiver. Then, note the similarities and differences in each waiver.

1. **Insurance Waiver Request Approved (Pre-Billing Waiver- <u>service</u> specific)**

☐ Benefit Verification form

☐ Insurance waiver request form filled out with the required documentation

☐ Approved insurance waiver

☐ Service authorizations in Vstone for a service provider with authorizations connected to an insurance waiver approval.

Questions I still have (if any):

2. **Insurance Waiver Request Approved (Pre-Billing Waiver- <u>provider</u> specific)**

☐ Benefit Verification form

☐ Insurance waiver request form filled out with the required documentation

☐ Approved insurance waiver

☐ Service authorizations in Vstone for a service provider with authorizations connected to an insurance waiver approval.

Questions I still have (if any):

Insurance Waiver Request	Similarities	Differences
Pre-Billing Waiver – *Service Specific*		
Pre-Billing Waiver – *Provider Specific*		

Who supported me with this activity?

_____   _____
Name   Date Completed

   When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Preparing for Conversations about Insurance

Please take a few minutes to think about the conversations you will have with families about the use of insurance for early intervention. To help with this activity, you may want to review "10 Considerations when Families in EI have Non Employer Self-Funded Insurance Plans" which can be accessed via http://go.illinois.edu/SConline4.

Next, please answer the following questions:

1. **What do you feel is important to highlight during conversations about insurance?**

2. **In your opinion, is the Notice of Systems of Payments and Fees is a good tool to guide you through conversations about insurance?**

3. **What are the best ways to represent or discuss the benefits of using insurance with families?**

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ Questions for Families about Insurance

Please list some questions you might ask of a family to help determine what type of insurance plan they have. Then talk with your supervisor or trainer about the questions you can and/or should be asking about insurance plans as well as some talking points that might help you describe for a family what the difference is between an Employer Self-Funded insurance plan and any other private insurance plan.

Questions for Families Regarding Insurance:

?

?

?

?

?

Talking Points for Insurance (Employer Self-Funded vs. Other Private Insurance):

> 💬
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> 💬
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> 💬
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> 💬
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> 💬

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▶ Discussing Private Insurance Consent Forms

Please practice how you will introduce and explain each item on the *Consent and Use Private Insurance/Healthcare Benefits & Assignment of Rights* to a family. (The form is available within the CFC Procedure Manual, which can be found at http://go.illinois.edu/SConline4)

Reflect on the following questions and make notes to help prepare you for these discussions.

💬 How will you review each section? Will you go through each section one by one using examples and feedback to explain why each line item is important?

💬 While reviewing each section, how will you explain what the impact might be on that family?

💬 During the discussion, how might you link or interweave the areas that overlap within this form and the Notice of Systems of Payments and Fees? What areas overlap in each form?

✓ *If you have questions or concerns about any activity listed, please discuss them with your supervisor or trainer. When you have finished this activity, please return to the presentation and press play.*

"Insurance Waiver Scenario" Reflection

Please reflect on what you heard in the insurance waiver scenario and respond to the following questions:

1. **What did you liked about the scenario?**

2. **Was there anything this service coordinator included in the discussion that you have not heard anyone else share with families before?**

3. **Is there anything that the service coordinator may have left out during the discussion?**

4. **Is there anything you would do differently?**

When you have finished this activity, please return to the presentation and press play.

"Insurance Family Fee Scenario" Reflection

Please reflect on what you heard in the insurance fee scenario and respond to the following questions:

1. **What did you liked about the scenario?**

2. **Was there anything this service coordinator included in the discussion that you have not heard anyone else share with families before?**

3. **Is there anything that the service coordinator may have left out during the discussion?**

4. **Is there anything you would do differently?**

✓ *When you have finished this activity, please return to the presentation and press play.*

▶ ## Preparing to Discuss Public Insurance Benefits

Please make jot down some notes about what you might want to highlight as you introduce the use of public insurance benefits to families for their early intervention services.

Identify of some of the benefits you have learned about so far and then find a peer or supervisor to practice your delivery of the information found on the Consent to Use PII and Bill Public Benefits Form.

Who supported me with this activity?

_____ _____
Name   Date Completed

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

"All Kids Scenario" Reflection

Please reflect on what you heard in the insurance fee scenario and respond to the following questions:

1. **What did you liked about the scenario?**

2. **Was there anything this service coordinator included in the discussion that you have not heard anyone else share with families before?**

3. **Is there anything that the service coordinator may have left out during the discussion?**

4. **Is there anything you would do differently?**

When you have finished this activity, please return to the presentation and press play.

Explaining the Family Fee

Use the space provided to note the key talking points you would use to explain the family fee to a family. Please consider any additional information you would need to gather from a family to give them an estimate of what their family fee may be.

Talking points:

When you are ready, take some time and practice explaining the family participation fee calculation with at least one other person. This could be a peer or your supervisor.

My questions or additional notes:

Who supported me with this activity?

_____ _____
Name   Date Completed

 ✓   *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

📋 Optional Activity: Figuring out the Family's True Fee

Would you like some practice calculating the family fee so you can be ready to explain how it might work for a family? Take a look at the current *Family Participation Fee Program Fact Sheet* for this fiscal year (found in the CFC Procedure Manual available at http://go.illinois.edu/SConline4). Using what you have learned, calculate how much the family will pay for their IFSP period and see if you can figure out the true family fee.

#1: Kayla has an active IFSP that is active for exactly 12 months. The family will be getting the following services as discussed in the IFSP team meeting. Physical Therapy 1x/week 60 minutes. Her parents have BCBS PPO. They declined to provide proof of income and agreed to pay the highest fee. The maximum out of pocket expense for the family for the IFSP period is $2400.00. The family informs you at intake that they have a $5000.00 family deductible on their insurance plan which they have not met since it is the beginning of the year.	
What might the family pay?	
How did you calculate the fee?	

#2: Robert and Jeremy are twins both getting Early Intervention Services. Their 3rd birthday is in six months. Robert is getting Speech therapy 1x/week for 60 minutes and Jeremy is getting Occupational Therapy (OT) 2x/month for 60 minutes. Robert and Jeremy's father calls and tells you that according to the explanation of benefits he is getting from insurance Speech therapy has been getting reimbursed at $95.00 a session and OT is reimbursed at $110.00 a session. The Family participation fee maximum for the IFSP period is $1200.00 for the six months of service.	
What might the family pay?	
How did you calculate the fee?	
#3: Soo Jin is getting physical therapy 1x/week. Her mother calls you and states that according to the explanation of benefits, CBO is paying $10.00 per session to her physical therapist the rest is being covered by insurance. Soo Jin has an active IFSP for three months and the total family fee for that IFSP period is $150.00	
What might the family pay?	
How did you calculate the fee?	

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

The Family Fee Report in Vstone (HSPR0778)

Please follow the steps below so that you will be able to practice running the family fee report in Vstone.

- ☐ **Ask your supervisor, trainer or a peer to show you the steps to run the family fee report in Vstone.**
- ☐ **Before starting**, be sure the direct service authorizations _for services subject to fees_ are entered into the Vstone system. (Otherwise the report will show zero for the family fee amount.)

Steps to run Family Fee Report (HSPR0778) in Vstone:

Who supported me with this activity?

_____ _____
Name   Date Completed

✓ _When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training._

▷ Discussing Insurance and the Family Fee

Part 1: For this part, review and reflect on your talking points for the _Notice of Systems of Payments and Fees_ and the _Family Participation Fee Program Fact Sheet_. Make any notes about anything you would add or change when discussing these, based on what you have learned up to this point.

How I would share information about family fees using the **Notice of System of Payment and Fees**	How I would share information about family fees using the **Family Participation Fee Program Fact Sheet**

Part 2: Once you have completed Part 1, please find at least one peer in your office AND one friend or family member to practice your delivery of this information. Consider selecting a friend or family member who is not involved with the EI system. Then, when you practice, he or she might ask authentic questions that are similar to what a family in EI would really ask, since they would be less familiar with how the family fee works.

Make note of the questions you feel you need help answering and/or stumble with a response. You can review these questions or concerns with your supervisor or onsite trainer.

Questions about Delivering Family Fee Information:

Coworker who supported me with this activity

_____   _____
Name   Date Completed

Friend or family member who supported me with this activity

_____   _____
Name   Date Completed

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Section 4 Summary	A Reflection on Section 4

▶ ## Reviewing Illinois' System of Payments

Please complete the following activities to help reflect on what you have learned about the Illinois System of Payments.

1. List one example of how using insurance for EI services benefits both the family and the early intervention system.

How Using Insurance Will Benefit Both EI and Families

2. Please list the early intervention services that are <u>never</u> subject to family fee or use of insurance.

> 1.
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> 2.
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> 3.
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> 4.
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> 5.
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> 6.
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> 7.
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> 8.
>
> 9.

3. Please list one reason that a family may apply for an insurance exemption and what documentation is required for this type of exemption.

Why a Family May Apply for an Insurance Exemption?	**Documentation Required**

4. Please list one reason that a family may apply for a family fee exemption and what documentation is needed for this request.

Why a Family May Apply for a Family Fee Exemption?	**Documentation Required**

5. Please list one reason that a family may apply for an insurance waiver and what sort of documentation would be required for this type of exemption.

Why a Family May Apply for an Insurance Waiver?	Documentation Required

✅ Check-in

Section 4 provided information about the fund sources that support the Illinois EI System and how to share this information with families.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1 2 3 4 5

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5 on each of the following:

a. **Understanding how EI is funded** _____

b. **Ability to explain the benefits and use of insurance** _____

c. **Ability to explain how family fees fund EI** _____

d. **Ability to answer questions about how EI is funded** _____

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention.

✓ *This concludes the workbook activities for Section 4. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.*

Section 5: Evaluation, Assessment, and Eligibility

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline5

Section 5 Outline

Module 1: Evaluation and Assessment

> **Why Evaluate and Assess?**
>
> **Understanding Child Development**
>
> **Overview of Service Coordinator Responsibilities**
>
> **Coordinating Evaluation and Assessment**

Module 2: Evaluation and Assessment in Action

> **Multidisciplinary Team Members**
>
> **Evaluation Teams**
>
> **Evaluation and Assessment Instruments**
>
> **Reviewing Evaluation and Assessment Reports**

Module 3: Eligibility

> **Overview of Eligibility in Illinois**
>
> **Eligibility in Illinois by Developmental Delay**
>
> **Eligibility in Illinois by Medical Diagnosis**
>
> **Eligibility in Illinois by "At Risk through Informed Clinical Opinion"**
>
> **Re-Referrals and Ineligibility**
>
> **Annual Eligibility Re-Determination**
>
> **Documenting Eligibility**

Closing Summary

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

Identifying Child Development Resources

Please take a few minutes to visit the EITP resource page dedicated to the topic of Child Development, which can be found via the following link: https://uofi.illinois.edu/blog/view/6039/114617

After you have browsed the EITP resource page on Child Development, please identify at least one resource you think will help you as you learn about and/or review the topic of typical child development (meaning what is expected of all children regardless of delays or disabilities). Then list the reasons why you found it to be a useful tool for you in the space provided below.

What resource did you review?

List the reasons this resource was useful to you

-
-
-

Please review any questions you have with your supervisor and/or trainer. When you have completed this activity please return to the next course in this training.

Identifying Evaluators

This activity will help you familiarize with the materials your CFC office prepares to share with families to help them select an initial evaluator.
- ☐ Take some time to learn more about the evaluators within the areas you serve.
- ☐ Discover their skills, expertise, and areas they are willing to travel.
- ☐ Then, perform a search for evaluators in the Vstone system, in order to acquaint yourself with the process of identifying credentialed evaluators that can be authorized to perform initial evaluations.

Please use the space provided to document what you learned, the date the activity was completed, who assisted you with the activity if you required assistance and review any follow up questions you have for your supervisor or onsite trainer.

Materials my CFC office has to help me identify evaluators include:

Name of evaluators researched:

_____ _____ Qualified? [ ]
Name   Area of Expertise

_____ _____ Qualified? [ ]
Name   Area of Expertise

_____ _____ Qualified? [ ]
Name   Area of Expertise

Who helped me practice searching the system for credentialed evaluators?

_____ _____
Name   Date Completed

Follow up questions I have:

When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.

Putting Together a Multi-Disciplinary Team

This activity will provide some general information about a child and family entering early intervention and then you will have an opportunity to reflect on who might be needed for the evaluation/assessments and why their expertise might be needed.

1. The family enters early intervention with a referral from the physician indicating the child is two years old and not using many words yet. When you meet with the family for the initial visit, the family tells you that their son has had frequent ear infections and he just received tubes in his ears a few weeks ago. **Who might be part of the initial evaluation/assessment team based on the little information you know and why?**

2. At an initial visit you learn that the family is concerned because their child is 15 months old and not walking yet. **Who might be part of the multi-disciplinary team based on the little information you know and why?**

3. An infant who is 2 months old was just referred to early intervention because he has been diagnosed with Down syndrome. The family has no concerns about their child's development at this point in time and just wants to know more about what to expect as their child grows and develops. **Who might be part of this multi-disciplinary team based on the little information you know right now and why?**

4. A family is referred to early intervention because their child has cerebral palsy and at the initial visit you learn that the child has been meeting all of her milestones but having a difficult time with some of her motor skills. The family tells you that their daughter can crawl but that she is really tight on one side of her body. They also tell you that they have some concerns about how she keeps her right fist closed tight most of the time so she usually picks up her toys with her left hand. **Based on what you know so far who might be part of the initial multi-disciplinary team and why?**

When you have finished with this activity, review your responses with supervisor or trainer, and please return to the next course in the training.

Identifying Evaluation Teams

Please take a moment to check with your supervisor to find out if there are local evaluation teams to serve the children and families in your area. If so, find out what you can about the varying teams including who the point person is to contact and arrange for an evaluation with the evaluation team members. Then document what you learned in the space provided.

What to Identify	Response/Findings
Evaluation/Assessment Teams who serve children and families in the area that you work	
Important Things about these teams Examples: • special skills/expertise • contact person to schedule • preferred meeting dates • languages spoken	

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Reviewing Evaluation/Assessment Tools

Please take a few minutes to review the approved instrument list found in the Provider Handbook (available at http://go.illinois.edu/SCOnline5). Then review some recent evaluations/assessments that have been completed for the children and families that you are serving, or will be serving once you are ready to maintain a caseload.

Pay particular attention to where you can find the assessment instrument listed in the report. At a minimum, try to find a report for each of the evaluation/assessment type listed. Please document what you learned through this activity in the space provided below and please remember to review any questions you have with your supervisor or onsite trainer.

1. Global Evaluation/Assessment

Approved Instrument(s):

Types of information I learned through reviewing a report written with this tool include:

2. Speech Language Evaluation/Assessment

Approved Instrument(s):

Types of information I learned through reviewing a report written with this tool include:

3. Physical Therapy Evaluation/Assessment

Approved Instrument(s):

Types of information I learned through reviewing a report written with this tool include:

4. Occupational Therapy Evaluation/Assessment

Approved Instrument(s):

Types of information I learned through reviewing a report written with this tool include:

5. Social or Emotional Evaluation/Assessment

Approved Instrument(s):

Types of information I learned through reviewing a report written with this tool include:

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▶ ## Understanding the Report Format

Please take some time to review at least 2 reports that have already been completed and see how they compare to the required report format. You can use the same reports you used to complete the activity in the previous course on Evaluation/Assessment Instrument, or you can find 2 new reports to review. **In order to complete this activity you will need a copy of the report format, so you can do a side by side comparison to make sure that the completed reports have all of the components that the report format requires.**

What to Review/Proof	Report 1	Report 2
Type of Report (i.e. DT, OT, PT, ST)		
Did report include all required components of the report format?		
If not, what was missing?		

Does your office have support staff to help you distribute reports to families in a timely manner after you review/proof them? If so, please identify the person(s) in your office and in what ways are they able to assist you.

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Eligibility: Key Talking Points

Please take a few minutes to review the *Family Rights booklet* and *the Illinois Early Intervention: A Guide for Families* section on Eligibility. If you don't have a printed version of these booklets then resources can be accessed via the following link: http://go.illinois.edu/SCOnline5

As you review the section on eligibility, please identify the key points that you will to highlight for family as you review and explain eligibility to families. Use the space to identify some of these talking points as well as any questions you might have about how children and families are found eligible for the Illinois Early Intervention Program. Then when you are ready please return to the next course in the presentation.

Talking Points for Eligibility from Family Rights Booklet:

Talking Points for Eligibility from Illinois Early Intervention: A Guide for Families:

Questions about Eligibility for Illinois EI and My Role in Explaining Eligibility to Families:

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

▷ Understanding Informed Clinical Opinion

The NECTAC Notes article on Informed Clinical Opinion (available at http://go.illinois.edu/SCOnline5) addresses three important questions about what informed clinical opinion is, how it impacts eligibility and why it is important to document it.   It is important that early interventionists are knowledgeable about informed clinical opinion, so they can ensure it is used appropriately to support eligibility determination for children/families in the Illinois Early Intervention System. Therefore, please respond to the following questions using your own words based on what you learned from this course and the article you have read.

🗨 What does informed clinical opinion mean in the context of Part C?

🗨 How does informed clinical opinion affect the determination of eligibility?

🗨 Why is it necessary to document informed clinical opinion?

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Understanding Medical Conditions

Take some time to look through the *Child and Family Connections Procedure Manual* (http://go.illinois.edu/SConline5) and familiarize yourself with the various medical conditions that would make a child eligible for early intervention.

Then use the space below to make note of any conditions you feel you need to learn more about and seek out additional information about those diagnosis. Your supervisor may be able to direct you to someone who can answer some of your questions related to diagnosis such as a developmental pediatrician or an Illinois Medical Diagnostic Network Coordinator (IMDN) that may provide training and technical assistance to your local office.

Medical Conditions that I am familiar with include:

Medical Conditions that I feel I could use more information on include:

Potential Resources - my supervisor or onsite trainer may suggest I seek out for more information about various medical diagnoses:

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Understanding Risk Factors

Please review the following scenario, which is about a child named Noreen and her mother, Nora. Then complete the reflective and follow up questions pertaining Noreen's potential eligibility for early intervention. You may want to consider having the procedure manual open to the page that reviews the various risk factors that could impact eligibility. After you complete this activity on your own please review your responses and any follow up questions you have with your supervisor or onsite trainer. Then, when you are ready you may proceed to the next course.

Meet Noreen

Noreen was referred to Early Intervention by her teacher at Amazing Kids, which is a childcare center located within American Youth Psychiatric Recovery Home. This particular home is geared toward teenage mothers with psychiatric problems. Residents at this home are able to go to school while their children are in childcare during the day.

- Noreen is 21 months old and her teacher reported that she was concerned because Noreen's mother, Nora, is very shy and she seems to be distant and withdrawn from Noreen.
- Nora is 15 years old and attends high school during the day, while Noreen is at the child care center. Tara has been in and out of psychiatric hospitals since she was 9 years old.

Based on the limited information you have about Nora and Noreen, can you identify any potential risk factors that might make Noreen eligible for EI with appropriate documentation? If so, what are they?

Risk Factor_____
Documentation:

Risk Factor_____
Documentation:

Risk Factor_____
Documentation:

Risk Factor_____
Documentation:

Learning More about Noreen and Nora

Mildred, the EI service coordinator, set up an intake appointment with Nora. Mildred completed a Routines Based Interview (RBI), an ASQ-SE, and gathered the remaining information needed to complete the Intake and Social History form. Nora disclosed to Mildred that she drank excessively during the pregnancy and that she has never disclosed this to anyone. Nora also reported that sometimes Noreen cries for long periods and is inconsolable. Nora stated the following as her biggest concerns:

1. Noreen's constant crying
2. Having a hard time going to sleep
3. Noreen is a very picky eater
4. She does not know how to play with Noreen
5. Keeping Noreen quiet

Noreen was evaluated by a speech language pathologist (SLP) and she showed an 18% delay in expressive language and an 11% delay in receptive language. She was also evaluated by a developmental therapist (DT) who found a 24% delay in adaptive skills. All other domains were within

Based on what you know so far, is Noreen eligible for early intervention? *If so, how did you determine eligibility (what information did you use)? If not, why?*

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ ## Identifying Resources for Ineligible Children and Families

Please take some time to speak with the Parent Liaison in your office and learn about some the local resources that families may seek to better understand and support their child's development when they are found ineligible for early intervention. Document some of these resources in the space provided below and proceed to the next course when you are ready.

Non-EI Community Resources **I could share with families:**	**Where to find more information** **on Non-EI Resources for families** **regardless of EI participation**

Parent Liaison who supported me with this activity

_____ _____
Name   Date Completed

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Preparing Eligibility Letters

Please take a few minutes and familiarize yourself with the sample eligibility and ineligibility letters available in the CFC procedure manual (http://go.illinois.edu/SCOnline5). Then, find out if one of your co-workers and/or your supervisor has an editable, electronic copy (i.e. Word document) of these letters that they can share with you.

- These electronic copies will allow you to edit and update the individual names and reasons for eligibility when you prepare letters for families at the time of initial and/or annual eligibility determination.
- If no one has an electronic version in a Word document to share, then take this time to create your own template of these letters so you can easily edit them as needed.

✉ Template Letters I Have

List the electronic (Word) versions of template letters you have obtained or have created:

Who supported me with this activity?

_____　_____
　　　　　　　　　　　　　　　　　　　Name　　　　　　　　　　　　　　　　　　　Date Completed

✓　*When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Documenting Eligibility in the Electronic Record

Talk with a supervisor about how and where eligibility is documented in the Vstone system. Observe the screens that are visited to document eligibility for initial eligibility determination, annual eligibility determination, and when a child and family are found ineligible.

Please remember to have someone supervise you the first time you practice entering this information for a child and family that you serve, as these fields are difficult for service coordinators to edit once information has been entered and saved in the electronic system.

Initial Eligibility

Date I observed or practiced electronic documentation in Vstone:

    PA35: _____   SV01: _____   CM04: _____

Person who supported me with this activity

_____ _____
Name   Date Completed

Annual Eligibility

Date I observed or practiced electronic documentation in Vstone:

    PA35: _____   SV01: _____   CM04: _____

Person who supported me with this activity

_____ _____
Name   Date Completed

Ineligibility

Date I observed or practiced electronic documentation in Vstone:

 CM04: _____   PA15: _____   Other Referrals made? _____

Person who supported me with this activity

_____ _____
Name   Date Completed

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Rating Your Knowledge of Child Development

At this point in time, please rate yourself as to how well you understand child development and the different areas of development that will be evaluated and/or assessed by a multidisciplinary team.

1 = You know a little but feel you need more time to grasp/understand what it means to you.

5 = You are very confident in your understanding of child development and the different areas of development that will be evaluated and assessed during the multidisciplinary evaluation.

Please be honest with yourself when you respond to these questions, as there is no "grading" and no wrong answers. **Your responses to these questions will help you help you track/measure your own progress as you learn about your role in early intervention.**

	1	2	3	4	5
Child Development (in general)	◯	◯	◯	◯	◯
Cognitive	◯	◯	◯	◯	◯
Physical	◯	◯	◯	◯	◯
Communication	◯	◯	◯	◯	◯
Social or Emotional	◯	◯	◯	◯	◯
Adaptive	◯	◯	◯	◯	◯

When you have finished with this activity please move on to the next activity in the presentation.

Proofing a Sample Report

This section also provided a lot of information about your responsibilities when it comes to reviewing and proofing evaluation/assessment reports. Please take a look at the sample report provided on the following pages in your workbook and identify the following:

a.   **What, if anything, is missing** from the report that should be included?
b.   **What should not be in the report** that was included in the report?
c.   **What would be your next steps** if this was a report that you were reviewing for a child and family you work with?

Monica Bestot, OT   Jan Superpt, PT
Testing, IL 98765   Roses, IL 12345
987-654-3210   123-456-7891

ILLINOIS EARLY INTERVENTION
Physical and Occupational Therapy Evaluation/Assessment
<u>**SAMPLE REPORT WITH ERRORS FOR TRAINING PURPOSES ONLY**</u>

Child's Name: Mario Test
Early Intervention #: 123456
Date of Birth: March 1, 2014
Chronological Age: 25 months   **Adjusted Age:** NA
Parent's Name: Suzie Sheer   **Language Spoken in home:**   English
Service Coordinator's Name: Serena Supersc   **CFC #:** 52
Physician's Name: David Superdoc
Type of Report: Assessment (Eligibility was determined March 29, 2016)
Date of Assessment: March 13, 2016

Provider Name: Jan Superpt, PT
Provider Phone Number: 123-4567891
Provider Discipline: Physical Therapy

Provider Name: Monica Bestot, OTD, OTR/L
Provider Phone Number: 987-654-3210
Provider Discipline: Occupational Therapy

Location of Evaluation/Assessment: Mario was evaluated at her babysitter's house today with his babysitter present and participating in the assessment. His mother provided good insight into his behavior, personality and performance.

Referral Information: Mario was referred to Child and Family Connections by Dr. Supermd due to concerns with her social development. He was evaluated in his home on March 29, 2016 by social work and developmental therapy. The evaluators recommended PT and OT assessments due to additional concerns regarding her physical development and her defiant behavior. Connie the babysitter reported that she was initially concerned with her social skills, but following his initial evaluation, additional areas of concern were brought to her attention, especially in regards to his behavior and that he falls down frequently.

Instrument(s) Administered during Evaluation and/or Assessment:
PDMS-2 (Peabody Developmental Motor Scales-2):
The PDMS-2 assesses gross motor skills in three areas for a child ages 12 months through age 5: Stationary, which assesses the ability to maintain positions against the force of gravity; Locomotion, which assesses the ability to move between positions as well as forward through space and Object Manipulation, which assesses the ability to kick, catch and toss a ball. The fine motor portion of the Peabody Developmental Motor Scales-2 (PDMS-2) was utilized to assess fine and visual-motor skills. This portion of the test evaluates a child's grasping skills when offered a variety of objects, as well as her visual-motor integration-i.e. how she uses her eyes and hands together.   This is a standardized assessment for children from birth to six years of age.

Developmental Domain Addressed:

Test Instrument:	Domain Addressed:	Age Equivalency
PDMS-2: Stationary	Physical-Gross Motor	**See Below
PDMS-2: Locomotion	Physical-Gross Motor	**See Below
PDMS-2: Object Manip	Physical-Gross Motor	**See Below
PDMS-2: Grasping	Physical-Fine Motor	~18 months**
PDMS-2: Visual-Motor	Physical-Fine Motor	~18 months**

PLEASE NOTE: The PDMS-2 was not able to be administered in a standardized manner and therefore the results are a reflection of clinical observation and parent report. Based on clinical opinion of occupational and physical therapists, the assessment does represent her skills and abilities. Based on clinical observations of his gross motor development, his gross motor skills would be typical of a younger child, aged 15-18 months old and his fine motor skills are typical of a child in the ~18 month range.

Evaluation and/or Assessment:

Developmental and Social History: Mary describes Mario as having settled down a bit, although she can get upset very easily. As a baby, Mary describes Mario as "very fussy". He was irritable and she attributed that to her reflux and colic. He did not tolerate tummy time. As a baby, she was hard to get to sleep. He is now sleeping through the night and took a good nap. She reports that he met his motor milestones within the later range of typical. He crawled either on hands and feet or by scooting on his bottom. He began to walk independently at 18 months. He was recently hospitalized after he banged his head on the cement patio and completely passed out. His parent took him to the emergency room at ABC hospital where he was kept for observation for 48 hours.

James lives with both parents in their home. He attends a "Mom and Me" playgroup through the community park district and his babysitter reports that it is often difficult to participate in the playgroup because of Mario's aggressiveness with others in the playgroup.

Medical History: Mario was born at 41 weeks following an uncomplicated pregnancy. Mario was delivered by C-section weighing over 8 pounds. Other than mild jaundice, which did not need any intervention, he did well after delivery and returned home with his parents. He has been healthy without any hospitalizations or serious illnesses, injury and no ear infections. He passed a hearing test last week.

Behavioral Observations: James was unengaged throughout the evaluation. Upon entering his home, he left the kitchen and hid in his room with the I Pad. He was observed to focus his entire attention to the I Pad. His mother asked him to come out multiple times but Mario appeared nervous. The examiners attempted to join James in his room but he cried and refused to come out of his room. He did this by screaming and crying. He appeared to be very disinterested in his mom and began to cry every time she approached him. He became interested in coming out to the kitchen when his mother turned on the television. Mario did not complete testing in a standardized way due to limited attention. Many of the tasks were left near him to explore however he never showed any interest in any of those tasks.

Clinical Narrative: In addition to the Testing Tools above, Mario's development was assessed through clinical observation of interactions with the evaluators and her parents in the natural environment. Mario was found to qualify for EI services when he was evaluated on March 29, 2016 for social work and developmental therapy. A medical diagnostic was also recommended at that time.

Physical (Fine Motor): Mario showed many emerging fine motor and visual motor skills. It is important to note that due to his lack of interest and focus on media such as I Pad and television, James may not have shown all his skills today. He is able to take nesting cups apart and take rings of a ring stack. He is able to easily take off a cover of a container and empty the contents. He is able to put chips through a slot, and he was able to place shapes such as circle, square, triangle in a shape sorter. He appeared disinterested in puzzles and often screamed and cried when they were placed near him. His mother did not have the ability to soothe him.

Physical (Sensory): Sensory integration refers to the way the nervous system receives messages from the senses and turns them into appropriate motor and behavioral responses. Sensory integration can be impacted when sensory signals don't get organized into appropriate responses. A child with sensory processing challenges may find it difficult to process and act upon information received through the senses, which creates challenges in development of motor skills, play skills, and self-regulation.
Mario appears to have some difficulty processing, integrating, and modulating/filtering sensory input. For instance, he appears to get easily overwhelmed by visual, auditory, and movement inputs in a busy or novel environment. His mother notes that he often will stare at the television, her phone, or I Pad and will refuse to do anything else. . Mario also has difficulty maintaining eye contact in social interactions. She may feel overwhelmed or bombarded by visual input and has to look away to feel more organized in his body. He is a very picky eater and sleeps well through the night. He enjoys rough house and enjoys physical games.

Observations of Mario were well as parent report suggested that he demonstrates difficulty processing, organizing, and modulating sensory stimuli. As a result, he has learned to avoid situations (social, sensory) or overreact when he experiences discomfort or feels unsuccessful. His response may include rigidity, stubbornness, withdrawal from social situations or activities, or have emotional outbursts. Mario's sensory processing difficulties affect his ability to perform age appropriate gross and fine motor skills. Mario needs to be able to successfully process and organize sensory input from the environment and in his own body to produce organized motor output in fine and gross motor skills.

Physical (Gross Motor):
Mario is a 25-month old boy who was reluctant to engage with evaluators or his mother. His muscle tone is found to be at the lower range of within normal limits. Muscle strength and graded control are mildly reduced, especially in his core and hip girdle and he rounds his back when seated on the floor and protective reactions are a bit delayed, although present and symmetrical. He walks on his toes the majority of the time. Although he can walk and avoid obstacles, he falls frequently. He runs using a hurried walk. He squats to play, and will kneel to obtain his mother's phone or to use the I Pad. He is able to crawl up the stairs and is not getting down the stairs. He will not walk up the stairs holding the rail. His parents should provide him opportunities to go the park and should limit his "media" activities.

Summary and Interpretation of Today's Findings: Mario is a cute boy who was found to qualify for Speech Therapy. While the testing tool was not administered in the standard manner, by clinical observation of his play and movement as well as parent's report, the assessment today does provide an accurate representation of his motor abilities. Mario is showing some deficits directly related to sensory processing issues.

Recommendations for any additional EI Assessments or Community Resources to be discussed at the IFSP meeting:
- Occupational therapy, twice a week to work on Mario's sensory skills
- Limit the amount of media (Television, I Pad, phone) that Mario's is exposed to
- Sensory playgroup once a week

Please do not hesitate to contact the evaluators if you have any questions or concerns regarding this report.

_____   _____
Jan Superpt, PT   Monica Bestot, OTR/L
Physical Therapist   Occupational Therapist

To review your answers, please visit https://illinois.edu/blog/view/6150/344642 When you have finished with this activity please move on to the next activity in the presentation.

Are They Eligible?

A majority of this section is about eligibility, especially your role and responsibilities in eligibility determination and documentation of eligibility status. Please take a few minutes to review the following scenarios and answer the related questions regarding the child's eligibility.

> **Billy**
>
> Billy is 26 months old and the youngest of 3 children. Billy's parents contacted EI because they were concerned that Billy was not talking like Jonathan (age 7) and Kate (age 5) had at that age. The global evaluation was completed at Billy's daycare with the teacher and Billy's mom, which showed a 40% delay in communication. The speech and language evaluation was completed that evening with Billy's parents, which showed a 35% delay in communication.

	Yes	No
Is this child and family eligible for EI services?	⭘	⭘
Has the multidisciplinary evaluation process been followed?	⭘	⭘

What still needs to happen?

What additional information do I need to answer this question (if any)?

> **Corey**
>
> Corey is 26 months old and was referred due to concerns about his overall development. His family is concerned because he is not doing things that other kids in the playground are doing. The ASQ from the doctor indicated a below cut-off score in communication skills. Based on the intake and the information from the pediatrician, the SC arranged for a speech therapy evaluation. Evaluation results indicated a 35% delay in expressive communication and a 15% delay in receptive skills

	Yes	No
Is this child and family eligible for EI services?	⭘	⭘
Has the multidisciplinary evaluation process been followed?	⭘	⭘

What still needs to happen?

What additional information do I need to answer this question (if any)?

Check-in

Section 5 provided information about determining and documenting eligibility and how to share this information with families.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1 2 3 4 5

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5 on each of the following:

    a. Understanding the 3 ways to be found eligible for EI   _____

    b. Ability to explain eligibility to family   _____

    c. Ability to explain ineligibility to family   _____

    d. Understanding the use of informed clinical opinion   _____

    e. Understanding your documentation responsibilities   _____

    f. Ability to document eligibility in electronic record   _____

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention.

This concludes the workbook activities for Section 5. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.

Section 6: IFSP Preparation & Meeting Facilitation

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline6

Section 6 Outline

Module 1: Preparing for the IFSP

      Purpose of the IFSP Meeting

      The IFSP Document

      Preparing for the IFSP Meeting

      IFSP Document & Consent Prep

      Insurance & Fee Prep Activities

Module 2: Meeting Facilitation

      Defining Facilitation

      Roles of a Facilitator

      Facilitating Teaming

      Facilitation Tips

      Overcoming Facilitation Barriers

Module 3: Working with Interpreters and Translators

      Working with Interpreters and Translators

      Role of Interpreters & Translators

      Strategies for Working with Interpreters

Closing Summary

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

What Can You Learn from an IFSP Document?

Take a few minutes and review at least two IFSP documents for two different children/families. You may need your supervisor's help with this activity and they may want to help you select some good examples to review. As you review these IFSP documents, please pay attention to the information that is individualized and unique to each child and family. Take note of the information that is generated electronically and how that info is integrated with the information that is written by hand. Pay particular attention to the type of information that is documented in the levels of development section and how family-centered functional outcomes are written.

Based on the information you reviewed from the IFSP document, answer the following questions:
- *Do you get a good feeling for what the family's priorities are?*
- *What are the child/family's strengths, and what are the child and family hoping to achieve?*
- *If not, what was missing?*

IFSP I Reviewed	Priorities and Strengths	What is missing?
1st IFSP		
2nd IFSP		

Who supported me with this activity?

_____ _____
Name   Date Completed

✓ *Please review any questions you have with your supervisor and/or trainer. When you have completed this activity please return to the presentation.*

Customizing Your Own IFSP Meeting Letter

Check with your CFC office to see if there is a standard IFSP meeting letter that has been created for your office with the language that is found in the sample letter from the procedure manual. Then use their template to create your own version with your name and signature on it. When you have your template ready ask your supervisor to review and approve it for use.

Tip: You may want to create a template letter to print on letter head that has space to "fill in the blanks" with important information that will be unique to every child and family. This would include the child and family's name, the date you are sending the letter and the meeting date that you are confirming. This way you can have a bunch of template letters printed and in a file folder to grab and hand write the unique info pertaining to that family and their upcoming meeting. Just remember to make a photo copy of the letter to keep in the permanent record before it is mailed to them!

Who reviewed/approved my IFSP meeting letter?

_____ _____
Name   Date Completed

✓ *When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.*

Preparing Your IFSP Packet

Take a few minutes now and prepare your own collated IFSP packet. You may require the assistance of a supervisor or onsite trainer for this activity as they may have one already prepared that you can copy and label as your "master" packet so you don't ever run out. When you have finished with this activity please document the date you completed it and who assisted you with it (if applicable) and obtain your supervisor's approval

confirming that your master packet includes all the necessary components. Then proceed to the next course when you are ready.

> *Tip: Once you have your "master" packet together take a yellow highlighter and write "MASTER" on it so you don't accidentally use it and have to re-create it again.*

> *Tip: You may also want to make enough copies to keep some in your file cabinet drawer in a file folder labeled "IFSP packets" and make a few copies that can accompany a travel folder that goes with you to all your appointments. This way you always have extras with you in a moment of need.*

Who reviewed/approved my IFSP meeting packet?

_____   _____
<div align="center">Name   Date Completed</div>

✓   *When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.*

▷ # Ensure You Have All the Right Forms

This activity is intended to help ensure you have all the necessary forms pertaining to insurance and family participation fees that may be needed at an IFSP meeting. It is quite possible that your IFSP packet already includes all of this information in which case you can have your supervisor or onsite trainer review your packet and sign off on this activity without any further action required. However, if the following forms are not included in your basic "IFSP packet" then you may decide to do one of three things as you complete the activity.

Insurance and Family Fee Forms:

- ☐ Family Participation Fees Program Fact Sheet
- ☐ Notice of Systems of Payment and Fees
- ☐ Acknowledgment of Receipt of Notices (use one that was started at intake)
- ☐ Consent to Use Private Insurance/Healthcare Plan Benefits and Assignment of Rights
- ☐ Consent to Use Private Insurance Healthcare Plan Benefits and Assignment of Rights for Specific Services
- ☐ Consent to Use Personally Identifiable Information (PII) and Bill Public Benefits
- ☐ Notice to Use Public Benefits-All Kids Enrolled or Potentially Eligible for All Kids
- ☐ Insurance Exemption Request
- ☐ Pre- Billing Insurance Waiver Request
- ☐ Tax Savings Account Information Sheet
- ☐ Acknowledgement to Decline Exemption for Tax Savings Account
- ☐ Illinois Early Intervention Services Family Participation Fees Program Agreement
- ☐ Family Participation Fee Exemption Request

Option 1: Integrate the insurance and fee related forms that you may potentially into your basic "IFSP packet" that you prepared in a previous activity. However, since some of these forms are not needed for each and every IFSP there may be forms that you routinely have in excess in this packet.

Option 2: Create and "Insurance and Family Fee IFSP Packet" that has all the information related to insurance and family fee and you can have these packets readily available and with you at all meetings so you always have some extra forms with you even if you don't anticipate the need for all of them at every meeting.

Option 3: Talk with other service coordinators and see how they prepare and organize this info and then formulate your own organizational system so you have all the information you need with you at IFSP meetings.

Option selected (circle one):   1   2   3

Who assisted me or reviewed my work for this activity?

_____   _____
Name   Date Completed

✓   *When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.*

▷ **What Makes a Good Facilitator?**

Activity 1: Take a few minutes to pause and reflect on what it means to be a good facilitator. Take a few minutes to answer these questions in the space provided.

1.   **What do you think of when you think of a "facilitator?"**

2.   **What skills do you think are important for a facilitator to be effective?**

✓   ***When you have finished with this activity please return to the presentation and press "Play".***

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Activity 2: Please take a few minutes to reflect on your responses in Activity 1. Please note that being an effective facilitator takes time and practice and not everyone will be good at every component right away. If you identify an area that you would like to work on then you might want to pay close attention to how other service coordinators you observe handle themselves as meeting facilitators and perhaps you will find ways to strengthen your skills by observing others and then practicing something new.

1. **How do those skills match up with your skill set?**

2. **What would you like to work on as a facilitator?**

✓ *When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.*

▷ How Confident are You as a Facilitator?

Reflect on each of the roles reviewed in this presentation and how you feel about each role as they relate to your skill set. Then rate yourself on how comfortable you are in each of these roles by selecting the option that best describes your confidence level with this role. There is no right or wrong answers. Just give your honest opinion about your areas of strength and areas where you might want to build upon and/or work to gain some confidence in yourself.

Choices you can make for each one of these include *"very confident"* which you would select if you have zero concerns about your ability to fulfil that role, *"confident"* is what you would select if you feel like you have the skills and feel good about your ability to figure it out, *"need some practice"* is what you would select if you are a little uncertain about the role and how you will be with it but after some practice you will have a better idea about it, and *"HELP!"* is what you would select if you feel very uncomfortable with that part of your role and would like to seek some extra guidance or support for how to gain some confidence with that role.

Role	Help!	Need Practice	Confident	Very Confident
Manager	○	○	○	○
Gatekeeper	○	○	○	○
Timekeeper	○	○	○	○
Consensus Builder	○	○	○	○

If you have filled in any in these columns, talk with supervisor or onsite trainer about your questions and concerns about that part of your role as a facilitator.

When you have finished with this activity please review your responses with your supervisor or onsite trainer. Seek out any supports they can offer to assist you and after you have had some time to practice some of the strategies you learned from them check back in with them to reflect on what worked, what didn't work and where else you might need support to continue to strengthen these important skills.

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Impact of Personalities on Teaming & Facilitation

Take a few minutes to identify which personality trait (or traits) you feel you identify with in the space provided below. Then, as you reflect on the other personality traits, make some notes for yourself about how or when you will try to draw upon the skills and strengths for others to help you be a strong facilitator. When you have finished with the activity, please review your response with your supervisor or onsite trainer and engage in some reflection about the traits and strengths they see in you and how the support of other team members can help you with your facilitation skills.

Personality:

Enthusiast:	Mover:
intuitive, seeks excellence, is helpful and looks at the big picture	very task-orientated, self-confident, competitive and quick to act

Supporter:	Thinker:
sensitive, flexible, cooperative and in general are likable people	data driven and like facts, rational, thorough and often very detail-oriented.

I see myself being most similar to the _____ personality.

I see myself relying on other team members - *with different skills than mine* - to help me with these facilitation activities (i.e. a Thinker can help me take notes and check for understanding):

How My Supervisor Sees Me:

My supervisor or onsite trainer sees me as the _____ personality.

Additional ways we feel I can rely on the skills and traits of other team members *who are not like me*:

Who supported me with this activity?

_____   _____
Name   Date Completed

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Module: Meeting Facilitation   **Facilitating Tips**

▷ ## Facilitation Tools

Review some of the **Service Coordination Communication Tools** found on http://go.illinois.edu/SCOnline6
You might also want to check with your supervisor, onsite trainer and some peers to see what sort of meeting facilitation tools they use to help them prepare families and other team members for the meeting.

Then identify what, if any, of these tools you think you would like to try and perhaps even modify to make them your own. For example, you might want to use the meeting manners document but you might want to

add some or remove some. Or perhaps you want to make some changes to the agenda to customize it for your facilitation style.

Tools I would like to try:

⚙

⚙

⚙

⚙

⚙

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

☰ Optional Activity: Need More Practice?

Some additional resources for meeting facilitation can be found under **Service Coordination Meeting Facilitation Tools** on http://go.illinois.edu/SCOnline6.

> **"10 Rules for Asking Non-Threatening Questions"** is a list of questions which you may want to review to see if there are any that you might want to use.
>
> **"Tools Discussion Leaders Use in Open Discussions"** is a worksheet that gives you some tools discussion leaders use in open discussions. This worksheet has a place for you to list examples.

You are encouraged to print out this worksheet and jot down some examples that you can think of as it applies to your role as a service coordinator. In fact, you may even want to bring it with you when you observe other service coordinators and make note of some of the things that you heard or saw them do that would fall into some of these examples.

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ Identifying Qualified Interpreters

Check with your CFC office to see what tools or supports they have to help you identify a qualified interpreter. Also find out what steps you need to take if you are not able to find an interpreter for the family's native language.

▶ What Documents & Forms Are Already Available?

Check with your CFC office to see what forms and documents are available in languages other than English. Please also find out if there are some standard office procedures for how to authorize translators for their time provided for the translation of various documents and reports. For example, your office may have a standard allowance for the time given for the translation of eligibility and IFSP meeting letters and a different allowance for written translation of reports and the IFSP. Please note that even when there is a standard set by your CFC office that there always can be acceptations to the rule and if a translator requests more time than what is typically allowed then you should check with your supervisor to see what the protocol is for providing justification for additional time.

▶ Understanding Local Resources, Policies & Procedures

Please check with your CFC office to see if there are additional resources and supports that have been developed to assist you in your work with families through the use of an interpreter. Please also remember to check with your office on any specific procedures pertaining to professional boundaries and how this protocol may or may not be impacted by cultural considerations.

✅ Check-in

Section 6 provided information that will help you prepare for and facilitate IFSP meetings.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1   2   3   4   5

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5 on each of the following:

a. **Understanding of IFSP document components** _____

b. **Ability to organize and prep required IFSP paperwork** _____

c. **Confidence in your role as meeting facilitator** _____

d. **Confidence in working with interpreters** _____

e. **Understanding of your CFC office's procedures for authorizing translation services** _____

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention.

This concludes the workbook activities for Section 6. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.

Section 7: IFSP Development

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline7

Section 7 Outline

Module 1: Introduction to IFSP Meeting

       Setting the Stage

       The IFSP Meeting - Introduction to Bri

       Video Example – Introduction to Bri

Module 2: Levels of Development

       Levels of Development – Part 1

       Levels of Development – Part 2

       Levels of Development – Part 3

       Documenting Levels of Development

Module 3: Child Outcomes

       Introduction to Child Outcomes

       Facilitation Tools

       Introduction to Child Outcomes 1 and 2

       Reflection on Child Outcomes 1 and 2

       Child Outcome 3

       Child Outcomes – Building Consensus

       Documenting Child Outcomes

       Entering Child Outcomes Data

Module 4: IFSP Outcomes

       Family Centered Functional Outcomes

       Developing IFSP Outcomes

       Strategies to Achieve IFSP Outcomes

       Considering Resources and Supports

       Documenting IFSP Outcomes

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

▷ What Do You Know about Bri?

Now that you know a little bit about Bri and her family it is time to reflect on what you know about her eligibility for early intervention, the skills and strengths you learned about for Bri and her family, what her family's concerns are and what additional questions you have if any. Please use the space provided below to reflect.

1. Given what you know about Bri and the 3 ways children and families are eligible for early intervention (i.e. Developmental Delay, At Risk, Medical Diagnosis), circle what eligibility criteria is likely being used to establish Bri's eligibility. What documentation do you have to support this decision?

Developmental Delay	At Risk	Medical Diagnosis

What documentation do you have to support this decision?

2. Bri had 3 evaluations/assessments completed overall. One with each of the following: a speech language pathologist (SLP), a developmental therapist (DT) and an occupational therapist (OT). Are all 3 of the tools they used on the approved assessment instrument list? If not, which one are you unsure about? *(Tip: the approved assessment instruments available at http://go.illinois.edu/SCOnline7)*

SLP tool used _____   **Approved?**   **Yes**   **No**

DT tool used _____   **Approved?**   **Yes**   **No**

OT tool used _____   **Approved?**   **Yes**   **No**

3. What strengths, existing resources and supports did you learn about? As you brainstorm this list please remember to include Bri's strengths as well as her family strengths.

4. What concerns have been expressed and/or identified by the family and the evaluators?

5. What additional questions do you have, if any?

⊘ *Please review any questions you have with your supervisor and/or trainer. When you have completed this activity please return to the presentation.*

Developing My Facilitation Skills – Getting the Meeting Started

As you watch Chapter 1 of Bri's IFSP video (http://go.illinois.edu/SCOnline7) please make note of the facilitation techniques that the service coordinator (SC) uses to get the meeting started. Identify things that this SC does that you would like to try and what you would do differently if you felt that the facilitation techniques used didn't work as well as they could have.

What I like about how this SC facilitated the introductions and review of family priorities:	*What I might do differently when I facilitate an IFSP meeting may include:*

Facilitation techniques I would like to try include:

When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.

Developing My Facilitation Skills – Transitioning the Discussion & Including All Team Members

As you watch Chapter 2, Part 1 of Bri's IFSP video (http://go.illinois.edu/SCOnline7) note the facilitation techniques that the service coordinator (SC) uses, how the SC transitions the team into this important discussion, how the team members interact and how they are including the family and each other in the review of Bri's strengths and abilities.

Optional: We encourage you to jot down notes on Bri's communication development as you are watching to practice notetaking during an IFSP meeting.

What I like about how this SC facilitated the levels of development and transition:	*What I liked about the team interaction, team dynamics and information shared:*

Facilitation techniques I would like to try include:

Bri's Communication Development, including family priorities, strengths, abilities and areas of need

✓ *When you have finished with this activity please review your responses with a supervisor or trainer and return to the next course in the training.*

▷   ## Developing My Facilitation Skills - What Stands out to You?

As you watch Chapter 2, Part 2 of Bri's IFSP video (http://go.illinois.edu/SCOnline7) please note anything that stands out to you about the role of the service coordinator and other team members during this discussion. Observe the continued interaction that is taking place among the team members and how they are engaging the family.

Optional: We encourage you to jot down notes on Bri's cognitive and adaptive development as you are watching to practice your notetaking skills during an IFSP meeting.

What stood out about the role of the SC and other team members during discussion:	What I liked about the team interaction, team dynamics and information shared:

Facilitation techniques I would like to try include:

Bri's Cognitive Development (including family priorities, strengths, abilities, and areas of need)

Bri's Adaptive Development (including family priorities, strengths, abilities, and areas of need)

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Developing My Facilitation Skills – Making Connections across Developmental Domains

As you watch Chapter 2, Part 3 of Bri's IFSP video (http://go.illinois.edu/SCOnline7) please note what stands out about how the service coordinator (SC) facilitates this portion of the discussion. Consider connections the interventionists are making across the developmental domains and the family's naturally occurring routines.

Optional: We encourage you to jot down notes on Bri's physical (motor) development and social emotional development as you are watching to practice your notetaking skills during an IFSP meeting.

What stands out about how this SC facilitated the developmental domains discussion:	*Links across developmental domains and the family's naturally occurring routines and activities include:*

Facilitation techniques I would like to try include:

Bri's Physical (Motor) Development (including family priorities, strengths, abilities, and areas of need):

Bri's Social or Emotional Development (including family priorities, strengths, abilities, and areas of need):

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ Documenting Levels of Development in a Narrative Format

Now let's practice writing the narrative portion of the levels of development! Please use the space below to document the qualitative levels of development for Bri. Remember, the levels of development should be written in a **narrative format with complete sentences**. When possible you will want to focus on strengths, abilities, areas of concern and how these skills impact Bri and her family in a meaningful way within their daily routines and activities.

💻 *If you prefer to type your narrative, then please make sure to include your typed version in your workbook for review with your supervisor or onsite trainer to review the activity upon completion.*

This activity may require you to review the notes you took during Chapter 2, Parts 1-3 of Bri's IFSP video. If needed, you may want to re-watch the videos in order to write a narrative description of what you heard about her present levels of development in each of the developmental domains. If needed, the videos are available at http://go.illinois.edu/SCOnline7.

Family Priorities

Health & Medical Information (including hearing/vision)

Cognitive Development

Communication Development (Expressive & Receptive Language)

Physical Development (Gross Motor & Fine Motor Skills)

Adaptive Development (sometimes referred to as Self-Help Skills)

Social and Emotional Development

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Understanding Child Outcomes

This activity will help you identify questions you have about child outcomes as well as learn about some frequently asked questions that come up around them. You may even want to talk with your supervisor, onsite trainer, and peers to see what tools they use to help them review, discuss and facilitate the child outcome discussion at IFSP meetings. Remember to visit the **EITP resource page on child outcomes** (http://go.illinois.edu/SCOnline7) has a number of tools to consider.

My Questions about Child Outcomes:

?

?

?

?

?

On scale of 1 to 5, rate your understanding of the rating scale used to determine child outcome ratings.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1   2   3   4   5

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Tools to Support Me While I Facilitate Discussions

...

...

...

...

...

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Developing My Facilitation Skills – Child Outcome Discussions

This activity allows you to review some of the tools available to assist you when you facilitate discussions around child outcomes at an IFSP meeting. Please visit the **Child Outcome Summary (COS) resources** from EITP website (http://go.illinois.edu/SCOnline7) as well as the Child & Family Connections (CFC) Procedure Manual section related to COS process for guidance. Familiarize yourself with the tools and resources listed below, and then answer the reflective questions that follow.

- **CFC Procedure Manual guidance on the Child Outcomes Summary (COS) Process**
- **Instructions on the use of the COSF** - *These instructions provide general guidelines for completing the Child Outcomes Summary Form (COSF).*
- **Discussion Prompts for Child Outcomes** - *These discussion prompts can be used to expand the discussion of child outcomes. They can be used to make sure that IFSP team members are considering all relevant aspects of development for a particular outcome as well as to engage the parent in the discussion of the outcomes.*
- **Decision Tree without Numbers** – *This was designed to support the IFSP team's discussion and consensus on a child's outcomes rating.*

Reflect on the resources you reviewed and answer the following questions:

💬 **Have you seen other service coordinators use these tools to facilitate IFSP meetings that you have observed?** If so, which ones have you seen in use?

💬 **Which of these tools do you think you will use during an IFSP meeting?** Why do you think it will be helpful?

💬 **Are there other tools used at your CFC use to help facilitate this discussion? If so, what are they and how do you see yourself using them?**

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

Preparing Your Toolkit!

Consider which tools will support you as you facilitate discussions around child outcomes and make copies of them to include in your IFSP meeting packet and/or your travel folder that you bring to all meetings. Some tools you might be considered are listed below and available at http://go.illinois.edu/SCOnline7.

If you have extra copies, then you may share them with other team members who will be actively engaged in the discussion and decision making process around child outcomes. When you have finished this activity please document the date you completed it in the space below, and follow up with your supervisor or onsite trainer with any questions before proceeding to the next course.

- **CFC Procedure Manual guidance on the Child Outcomes Summary (COS) Process**
- **Instructions on the use of the COSF** - *These instructions provide general guidelines for completing the Child Outcomes Summary Form (COSF).*
- **Discussion Prompts for Child Outcomes** - *These discussion prompts can be used to expand the discussion of child outcomes. They can be used to make sure that IFSP team members are considering all relevant aspects of development for a particular outcome as well as to engage the parent in the discussion of the outcomes.*
- **Decision Tree without Numbers** – *This was designed to support the IFSP team's discussion and consensus on a child's outcomes rating.*

Tool(s) I Chose to Make Copies of are:

_____ _____
Tool(s)   Date Completed

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Reflecting on Your Knowledge & Skills

Please take a moment to reflect on your skills with regards to the statements listed in this activity. There are no "right" or "wrong" answers, just your honest opinion of your strengths, as well as areas and skills that might need additional support, time and practice. Afterwards, please review your responses with your supervisor or onsite trainer and see what additional support they may be able to offer to help you develop your skills.

1. **I fully understand the process for determining the three child outcome ratings during an IFSP meeting** (i.e. you know when this happens in the meeting agenda and why it happens when it does).

Strongly Disagree   *Disagree*   *Unsure*   *Agree*   *Strongly Agree*

2. **I understand the significance of completing the child outcomes, the rationale and importance for getting an accurate rating, and the impact the child outcome measurements can have on the state and national level.**

| *Strongly Disagree* | *Disagree* | *Unsure* | *Agree* | *Strongly Agree* |

3. **I feel confident in my ability to do the following:**
   a. **To explain what the three child outcomes are**
   b. **To provide examples of what the child outcomes are looking for (evaluating)**
   c. **To engage the team in a meaningful discussion around child outcomes**

| *Strongly Disagree* | *Disagree* | *Unsure* | *Agree* | *Strongly Agree* |

4. **I am aware of the tools that I can rely on to help me facilitate the discussion around child outcomes and feel confident in my ability to rely on the strengths of my fellow team members when needed to help ensure consensus is reached.**

| *Strongly Disagree* | *Disagree* | *Unsure* | *Agree* | *Strongly Agree* |

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ ## Exploring Additional Learning Opportunities

Please check with your supervisor or onsite trainer to find out additional trainings pertaining to child outcomes and/or child development they would like you to attend. You could also check the EITP events calendar at http://go.illinois.edu/EITPevents for both face-to-face events and online events. To view EITP online events only, please visit http://go.illinois.edu/EITPonline. Then make a list of these trainings in the table below to document the title, format [*online or face-to-face* (*F2F*)], and when you complete them.

Training Title:	Format	Date Completed:
i.e. Understanding Young Children's Development	*Online*	

⊘ *When you have finished with this activity please return to the next course in the training.*

Documenting Child Outcomes Decisions

Now you will have the opportunity to observe someone entering data in the AS03 screen for the levels of development, child outcome data and source information. Your observations may need to be done in steps as you shadow another service coordinator at IFSP meeting, and during pre-IFSP and post-IFSP meeting activities.

Please be sure to document the date you completed your observation and the date you completed your first data entry of the AS03 screen in the space provided below. When you are ready please proceed to the next course.

When you enter this information on your own for the first time for a family you serve, it is important to request support or assistance from a supervisor, onsite trainer or (if acceptable) a qualified peer. That individual can either observe your practice and/or proof your work in order to help you develop this important skill!

Who I observed enter every component of the AS03 screen:
(Components include levels of development qualitative and quantitative info, child outcomes ratings for all three child outcomes and the source information)

_____   _____
Name   Date Completed

_____   _____
Name (if observed more than 1 person)   Date Completed

_____   _____
Name (if observed more than 1 person)   Date Completed

Follow up questions I have (if any):

Who supported me when I entered the AS03 screen in its entirety for the first time is:

_____   _____
Name   Date Completed

Follow up questions I have (if any):

When you have finished with this activity return to the next course in the training.

▷ Developing Practice Based IFSP Outcomes

Please take a few minutes to read the article title "*Tips and Techniques for Developing Practice Based IFSP Outcomes*" which can be found at http://go.illinois.edu/SCOnline7

When you have finished reading the article, please reflect on what you read as you respond to the following:

One thing I learned from this article:	
How the article is similar or different to what I observe on my job training:	
Questions I have:	

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ Documenting Family Centered Functional Outcomes

As you watch Bri's IFSP Video (http://go.illinois.edu/SCOnline7) and listen to the discussion around one of the family centered functional outcomes (IFSP outcomes) being developed, please take some time to practice documenting what the outcome is based on the discussion that occurs as if you were the service coordinator capturing this information during the meeting.

IFSP Outcome Discussed in the Video

My Notes, Observations and/or Questions I have (if any):

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ ## Identifying Strategies to Achieve IFSP Outcomes

As you watch Bri's IFSP Video (http://go.illinois.edu/SCOnline7) and listen to the discussion around strategies being developed for one of the family centered functional outcomes (IFSP outcomes), please take some time to practice documenting what the outcome is based on the discussion that occurs as if you were the service coordinator capturing this information during the meeting.

IFSP Outcome Discussed in the Video

Strategies to Achieve this Outcome

My Notes, Observations and/or Questions I have (if any):

✓ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ Identifying Outcomes, Strategies and Resources & Supports

As you watch Bri's IFSP Video (http://go.illinois.edu/SCOnline7), listen to the discussion around outcomes, strategies and resources/supports.   If you would like to practice your note taking and documentation skills for capturing the outcome, strategies as well as the EI and Non EI resources and supports that are identified during this IFSP meeting please do so in the space provided below.

IFSP Outcome Discussed in the Video

Strategies to Achieve this Outcome

Resources and Supports (EI and non-EI)

My Notes, Observations and/or Questions I have (if any):

⊘ *When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.*

▷ Gathering More Information on Natural Environments

Please check in with your supervisor or onsite trainer to determine what, if any, additional training requirements are expected of you to help you better understand the importance of natural environments and your role in the developmental justification of need should there be a request for EI supports and services to take place outside of a natural setting.

You could also check the EITP events calendar at http://go.illinois.edu/EITPevents for both face-to-face events and online events. To view EITP online events only, please visit http://go.illinois.edu/EITPonline. Then make a list of these trainings in the table below to document the title, format [*online or face-to-face* (*F2F)*], and when you complete them.

Training Title:	Format	Date Completed:
i.e. Natural Environments & the Developmental Justification of Need Requirement	*Online*	

✓ *When you have finished with this activity please return to the next course in the training.*

▤ Optional: Understanding the Importance of Natural Environments

Please review the following resources found at http://go.illinois.edu/SCOnline7. Then, reflect on what you learned and how you might use this information to help facilitate team discussions with an emphasis on the importance of the natural setting. Then review your reflections with your supervisor or onsite trainer and proceed to the next course when ready.

- *Why is the Natural Environment so Important?* (PDF)

- DEC RP's with Examples - look under "Environments"

▷ Who Can Support Me?

Please talk with your supervisor or onsite trainer to learn more about the technical assistance (TA) your CFC offers to service coordinators before, during and after an IFSP meeting when needed. Document the names and numbers of these individuals in the space provided along with any notes you have for the types of support they can provide so you know when who to call upon for help when you need it. When you are ready, please proceed to the next course.

Name/Role	Contact Information	TA (support) for the following:

✓ *When you have finished with this activity please return to the next course in the training.*

▷ Developing My Facilitation Skills - Determining the Service Plan

As you watch and listen to the final chapter of Bri's IFSP meeting (http://go.illinois.edu/SCOnline7), please follow along answer the questions.

1. **What early intervention supports and services did you hear this team discuss that would be part of the service plan?**

2.   **What locations did the team discuss for the interventions to potentially take place?**

Are these natural settings for the child and family?   Yes   No

3.   **What factors need to be considered before the team can agree on the intensity, frequency and duration of EI supports and services?**

4.   **How will you gather this information in order to make an informed team decision?**

✓   *When you have finished with this activity please return to the presentation and press "play".*

▷   ## Key Questions to Help Determine Frequency and Intensity

Make a list of important questions you might want to ask the IFSP team when considering frequency and intensity of early intervention services for the service plan. You may want to include some of the ones shared in this course and talk with your supervisor, onsite trainer and/or some peers to see what questions they ask to help the team develop an appropriate service plan.

Who I Talked to about Key Questions for Determining Frequency and Intensity

_____   _____
                                             Name   Date Completed

_____   _____
                                             Name   Date Completed

Key Questions to Ask IFSP Team - Regarding Intensity and Frequency

[?]

[?]

[?]

[?]

[?]

(✓) *When you have finished with this activity please return to the next course in the training.*

▷ **Understanding Place of Service**

Take some time to check in with your supervisor or onsite trainer to review the following:

1.   Examples of appropriate developmental justification of need including a transition plan to return intervention to a natural setting

2.   Place of service options in the Vstone system and with their help identify some examples for what would constitute for each setting you might choose when you enter an authorization

3.   Identify any "group" intervention settings offered by early intervention providers in the area you serve and learn more about how they are authorized either as a natural or non-natural environment by their place of service code

Notes:

(✓) *When you have finished with this activity please return to the next course in the training.*

Documenting the Service Plan on the IFSP

Please check with your supervisor and learn about documentation activities expected of you within the service plan.   Find out if you are encouraged to list the agreed upon services on the IFSP Implementation and Distribution Authorization page of the IFSP. Also, take some time to observe and practice entering direct service authorizations in the SV07 screen with supervision.

Should I list the agreed upon services on the "IFSP Implementation and Distribution Authorization" page of the IFSP?   YES   or   NO

Who I observed entering service authorizations in the SV07 screen:

_____   _____
Name   Date Completed

Who supervised me as I practiced entering service authorizations in the SV07 screen:

_____   _____
Name   Date Completed

When you have finished with this activity please return to the next course in the training.

Preparing IFSP Meeting Authorizations

Make sure you observe someone entering at least one IFSP meeting authorization for an evaluator and see what you can learn about how this differs for authorizations issued for interpreters and translators following an IFSP meeting. Then document the date you completed this activity and the name of the person or people that assisted you with it.

Who I observed entering an evaluator's IFSP meeting authorization:

_____   _____
Name   Date Completed

Who I observed entering an interpreter's and/or translator's IFSP meeting authorization:

_____   _____
Name   Date Completed

When you have finished with this activity please return to the next course in the training.

Taking Care of YOU!

After you facilitate a few IFSP meetings, be sure to take some time to reflect on what worked well, what challenges existed, and who you might go to for support. As you process the meeting events and any next steps, consider how you may improve upon your skills and maintain the emotional energy you need to do your job well each and every day. In the space below, document these reflections and potential supports after you have had the opportunity to facilitate a few of your own IFSP meetings. You can return to this after you facilitate a few more IFSP meetings to track your progress and see your growth as a service coordinator.

Successes
What worked?

Challenges
What obstacles or issues did I encounter?

Supports
What CFC assistance is available to help me?

When you have finished with this activity please return to the next course in the training.

▷ Running IFSP Reports

Familiarize yourself with all the different report screens that you will visit after an IFSP meeting. Observe your supervisor, onsite trainer or another peer while he or she runs each of these reports. Then see if you can practice the steps with supervision. When you have completed these activities please document the person or people who assisted you with this activity in the space provided in your workbook.

Reports ran included the following (please list):

Who supported me with this activity?

_____ _____
Name   Date Completed

✓ *When you have finished with this activity please return to the next course in the training.*

✓ Check-in

Section 7 provided information that will help perform your duties related to IFSP Development.

A 1 would mean you feel unsure and would like to learn more or need more time grasp/understand what it means to you before you start working with families.

1 2 3 4 5 →

A 5 means you are very confident in your understanding of the rights of families. You feel equipped with the tools ready to start working with families!

Rate yourself between 1 and 5 on each of the following:

a. **Ability to facilitate an IFSP meeting** _____

b. **Understanding of 3 statewide child outcomes** _____

c. **Facilitating develop family-centered outcomes & strategies** _____

d. **Ability to ask questions during service plan development** _____

e. **Entering data in Vstone during IFSP development** _____

⧗ *There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention*

✓ *This concludes the workbook activities for Section 7. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.*

Section 8: IFSP Implementation

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline8

Section 8 Outline

Module 1: Implementing the IFSP

      Understanding EI Services

      Understanding Covered Services

      Identifying Service Providers

      Direct Service Authorizations

      IFSP Development Time

      Working with Associate Level Providers

      Distribution of the IFSP

Module 2: Monitoring the IFSP

      Why Monitor?

      Using the EI Principles

      Monthly Contacts

      6 Month Reviews

      Annual IFSP Review

      Encouraging Teaming and Collaboration

Module 3: Balancing Projects and Multiple Priorities

      Let's Get Organized!

      Favorite Organizational Tips

      Vstone Reports to Stay Organized

      Prioritizing and Organizing Time Sensitive Activities

      Setting Boundaries and Expectations

      Maximizing Productivity

      Taking Care of You!

Closing Summary

Describing EI Services

Take a few minutes to familiarize yourself with each of the 16 services that may be covered in the Illinois EI System as they are deemed necessary on an IFSP to help reach family centered functional outcomes. Describe each service in your own words as you would when you discuss services and supports with families. Please use the space provided or type answers in a separate document that you include with this workbook.

Tip: You may use the Provider Handbook to learn about each service and also check in with your peers to see how they describe these services.

Provider Handbook: http://go.illinois.edu/ProviderHandbook

EI Services

1. Assistive Technology
2. Audiology, Aural Rehab and Other Related Services
3. Developmental Therapy
4. Health Consultation
5. Interpretation & Translation Services
6. Medical Services
7. Nursing
8. Nutrition
9. Occupational Therapy
10. Physical Therapy
11. Psychological and Other Counseling Services
12. Service Coordination
13. Social Work and Other Counseling Services
14. Speech-Language Pathology Therapy
15. Transportation
16. Vision

Service	Description of service and how it supports families in EI (in your own words)	Questions or qualified contact for this service
Early Intervention		
Assistive Technology (AT)		
Audiology, Aural Rehab and Other Related Services		

Service	Description of service and how it supports families in EI (in your own words)	Questions or qualified contact for this service
Developmental Therapy (DT)		
Health Consultation		
Interpretation & Translation		
Medical Services		
Nursing		
Nutrition		
Occupational Therapy (OT)		

Service	Description of service and how it supports families in EI (in your own words)	Questions or qualified contact for this service
Physical Therapy (PT)		
Psychological and Other Counseling Services		
Service Coordination		
Social Work *In your response please make note about how this is different from psychological and other counseling services*		
Speech-Language Pathology Therapy		
Transportation		
Vision		

✓ *Please review any questions you have with your supervisor and/or trainer. When you have completed this activity please return to the presentation.*

Covered EI Service or Not?

Review the following examples and place a check mark next to all of the ones that you believe are a covered EI service. Remember to utilize the Provider Handbook (http://go.illinois.edu/ProviderHandbook) as needed to help you with your responses. Once you return to the course you will receive feedback on this activity. Please remember to check in with your supervisor or onsite trainer if you have follow up questions.

Examples	☑ Covered	☒ Not Covered
1. A nurse coming to their home and provides child care while parent works		
2. An occupational therapist scheduling visits at the child care center so the teacher can learn how to work best with the child to help meet IFSP outcomes		
3. An early interventionist going to the family's home to help the child navigate the front steps and other needed motor skills		
4. A therapist providing ideas and strategies for parent(s) or caregivers to take a 2 year old with autism grocery shopping		
5. The psychologist and family agreeing to meet at the family's favorite restaurant to identify strategies for eating outside of the home without a major melt down		
6. A service coordinator scheduling visits to a speech therapist (3 times a week) in a university clinic without justification on the IFSP		
7. A primary care physician conducting a "well baby" check		
8. A physical therapist providing a special seating device for the child for better positioning when playing with toys and sitting at the dinner table		
9. A service coordinator helping locate respite care (i.e. care that is giving rest or relief) so the parents can go out monthly		
10. A service coordinator locating a child care center for a family		
11. A service coordinator recommending weekly home visits to help the child gain new skills and to help the family learn ways to practice these skills each day		

⊘   *When you have finished with this activity please return to the presentation and press "play".*

Understanding Direct Service Authorizations

Please complete the following activities that pertain to direct service authorizations and be sure to connect with your supervisor as needed for support:

1.   Observe a service coordinator entering direct service authorizations. When you are ready, enter your own with supervision and support as needed. Direct service authorizations are a lot easier to edit

before they are saved, so please remember to ask questions if you are unsure about something when you are entering these on your own for the first time.

> ### Entering Direct Service Authorizations
>
> _____   _____
> Name of Service Coordinator I observed   Date Completed

2. If you have not done so already, find out if your office has an AT Coordinator to assist you with assistive technology requests and authorizations. If you will have responsibilities entering AT authorizations, then observe someone as they enter these authorizations and ask questions as needed the first time you enter one on your own.

> ### Entering Assistive Technology Authorizations
>
> _____
> Name of AT Coordinator (if applicable)
>
> _____   _____
> Name of Service Coordinator I observed (if applicable)   Date Completed

My responsibilities with AT authorizations include (if applicable):

3. Check with your supervisor to see if you are required to complete the following online trainings offered by EITP (http://go.illinois.edu/EITPonline). Complete these trainings for additional EI Credit as needed.

> ### Additional Online Trainings Required
>
> ☐ *Natural Environments & the Developmental Justification of Need Requirement*
> ☐ *AT in Illinois: A Review of Policies and Procedures*
>
> List any other trainings you are required to take or you want to seek out for additional support:
>
> ☐
> ☐
> ☐

⊘ *When you have finished with this activity, please return to the next course in the training.*

Learning My Office's Policies for IFSP Development Time

Please take a few minutes with your supervisor to determine how ongoing IFSP development authorizations are issued. Be sure to learn about the policies and procedures in your office for when additional time is needed, in order to know how to document IFSP development time and how/when authorizations should be approved.

> **In my CFC office, IFSP Development authorizations are typically issued for each provider as**
>
> **_____ per _____ for _____ minutes**

If additional time is requested, I should ask the following questions and/or complete the following activities before additional time is authorized:

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Identifying Credentialed Associate Level Providers

Please check with your office to find out if they have a master list of credentialed "Associate Level Providers".

You may also want to visit the Provider Connections website (https://www.providerconnections.org) and practice looking up providers by their credential so you know how to look up an associate level provider when needed.

When you have finished with this activity, please return to the next course in the training.

Connecting Your IFSP Team

Learn ways to ensure everyone on the IFSP team is aware of who all the team members are by talking to a few service coordinators or your supervisor. Some examples aside from the service authorization in the IFSP are a customized IFSP cover page or the use of an IFSP Team Contact list.

Please use the space below to note the different methods for connecting members IFSP team members you learned in your office and from your peers. Identify some approaches you would like to try to help ensure team members know everyone else on the team and how to reach each other.

How to ensure everyone on the IFSP team <u>knows</u> each other

How to ensure everyone on the team can <u>contact</u> each other

Tip: *Section 7 has additional information about how and where to run the necessary IFSP, family fee and insurance reports for distribution, if you need a refresher. Resources for Section 7 can be found at*
http://go.illinois.edu/SCOnlineResources

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the next course in the training.

Understanding Billable and Non-Billable Activities

Please review the "Billing Guidelines and Use of Insurance" section of the Provider Handbook (http://go.illinois.edu/ProviderHandbook) and use the space provided to document any questions you have.

My Questions about Billable and Non-Billable Activities:

[?]

[?]

[?]

[?]

When you have finished with this activity please review your questions and responses with a supervisor or trainer and return to the course.

EI Principles: A Guided Practice Activity

Identify which statements look like the EI principles and which ones do not.

Statements	☑ Looks Like EI Principles	☒ Doesn't Look Like
Sending the message that the more service providers involved the more gains the child will make		
Developing a team based on the child and family outcomes and priorities		
Making time for team members to communicate formally and informally		
Defining team from only the professional disciplines that match the child's deficits		
Having separate providers seeing the family at separate times and addressing separate outcomes		
Understanding when to ask for additional support and collaboration from team members		

When you have finished with this activity please return to the next course in the training. Your answers will be reviewed in the next course.

Monthly Contacts - Conversation Starters

The CFC Procedure Manual indicates that service coordinators need to have contact with families on a monthly basis (in person or by phone) to help them monitor the implementation of the IFSP, assess the family's satisfaction with services and supports and verify demographics and financial information.

Please take a few minutes to learn about your office's communication procedures and consider what questions you might ask to help you get the conversation going during these routine contacts. Please use the space provided to brainstorm some conversation starters you might use during your monthly contacts with families.

☐   Find out the policies and procedures in your CFC office for communicating with families electronically
      via email or text for monthly contacts.
☐   See if your CFC office has a standard letter to contact families about the following:
      o   insurance changes (possibly sent annually or biannually)
      o   inability to reach a family in person or by phone during monthly contacts

---

Questions I Might Ask a Family to Start Conversations during Monthly Contacts:

When you have finished, please return to the course and press play.

Documenting Progress at IFSP Reviews

Please observe a six month review with an experienced service coordinator. Listen closely to the discussion of progress around functional outcomes. Use a blank IFSP outcome page to follow along and document progress toward the outcome in the appropriate section of that outcome. Include a description of progress (or lack thereof) as you listen to the team discussion. Then document the team's agreement on the outcome, if the outcome has been met, revised or discontinued.

Observing and Documenting Progress at a 6 Month Review

_____   _____
                    Name of Service Coordinator I observed   Date Completed

When you have finished with this activity please review any questions with a supervisor or trainer and return to the next course in the training.

Preparing for Annual IFSP Reviews

Please prepare an "Annual IFSP Review" packet that includes blank, hard copies of the IFSP pages, forms and consents you might need with you when you prepare for conducting an annual IFSP review. You may want to use the annual review checklist found on http://go.illinois.edu/SCOnline8 to make sure you have everything you need.

Date completed: _____

Next, observe at least one other service coordinator the activities completed before, during and after an annual IFSP review. Be sure to ask them for tips or advice on how they stay organized and accomplish everything required for these meetings.

Observing Activities around the Annual Review

_____ _____
Name of Service Coordinator I observed   Date Completed

Organization Tips I Would Like to Try

When you have finished with this activity please return to the next course in the training.

Fostering Teaming and Collaboration

Please list a few ways you plan to foster teaming and collaboration as you help implement, monitor and review the IFSP for family's you serve.

Tip: *If it helps, talk with your peers and learn what they do when monitoring the IFSP to help them engage in the recommended practices (http://ectacenter.org/decrp/topic-teaming.asp). You may also want to review the Service Coordination resource page (http://go.illinois.edu/ServiceCoordination) for tools you can use.*

Tools and Tips for Teaming and Collaborating

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When you have finished with this activity please review any questions you have with your supervisor or onsite trainer and proceed to the next course.

▷ Organizing Your Responsibilities

Take a few minutes to identify any daily, weekly, monthly, quarterly and/or annual activities related to service coordination that you can recall.   As you go through this module, reflect on the things you heard that you would like to try to help you stay organized with those activities.

Frequency	Activities	Organizational Strategies I Want to Try
Daily		
Weekly		
Monthly		

Frequency	Activities	Organizational Strategies I Want to Try
Quarterly		
Annually		
Comments/Questions		

✓ *When you have finished with this activity please review any questions you have with your supervisor or onsite trainer and proceed to the next course.*

▷ **Learning Organizational Strategies from Others**

Please review the "**Checklists and Systems for Organizing Service Coordination Activities**" section of the EITP Service Coordination resource page (http://go.illinois.edu/ServiceCoordination).

Next, visit with in with your peers, supervisor and/or onsite trainer to learn how they use lists and/or tickler systems to help them stay organized. Find out how and where they store their systems, what their routine is for keeping them current and how they keep the information they are organizing confidential. Then decide what

organizational strategies you will try and/or make remarks about ones you have tried already and how they are working for you.

Organizational Systems I Would Like to Try

✓ *When you have finished with this activity please review any questions you have with your supervisor or onsite trainer and proceed to the next course.*

▷ **Making Vstone Reports Work for You**

Talk with other service coordinators to see how they use Vstone reports and decide if these are activities you want to try. Practice running a caseload report and participant follow up report for a family you serve. Go through each report and see if you can identify which families have activities that are coming due. You may need to rely on the permanent record and the electronic record to help you figure this out if you have not yet implemented another organizational system such as a tickler file system.

Which of these reports might you use?

How do you think it will compliment any other organizational system you think you will use?

✓ *When you have finished, please return to the course and press play.*

☰ Optional: Color Coding Activities

If you decide you want to implement a color coding system, you may want to create a key that will identify which activity correlates to the colors you choose to use. Use a highlighter, marker or colored pencil to fill in the circle with the color you choose to correlate with the following activities:

⃝ **6 month IFSP review**   ⃝ **Transition Planning Activities**

⃝ **Annual IFSP review**   ⃝ **Transfer/Case Closure Activities**

✓ *When you have finished with this activity please return to the next course in the training.*

▷ Handling Time Sensitive Activities

Reflect on the strategies you learned and consider the best ways to prioritize and organize time sensitive activities. Please take some time to check in with your peers, supervisor and/or onsite trainer to see what they do to help prioritize all their responsibilities.

Then identify at least one thing you would like to try as you learn to prioritize and organize your time. Also, if you haven't done so already, please check with your supervisor to see what sort of supports are available to you in your office so you can consider how and when to share activities in the future.

Strategies to Try	
Who and What I Can Rely on Support Staff for	
Questions I have	

✓ *When you have finished with this activity please return to the next course in the training.*

▷ **Managing Communications and Calendars**

As this course comes to a close please review the communication tools found on http://go.illinois.edu/SCOnline8 under Module 3 and download any of the materials that interest you. Once you identify the tools you plan to use to manage phone calls, emails, outgoing voicemail messages, auto-replies, message logs and your calendar, review them with your supervisor to see if they have any suggestions for you to consider.

Area to Manage	Boundaries and Expectations I Plan to Try
Phone Calls	
Emails	
Message Logs	
Calendar	

✓ *When you have finished with this activity please return to the next course in the training.*

Reflecting on Productivity

Please take a few minutes to reflect on your strengths and the areas where you are easily able to maximize your productivity. Then note areas or things that you could improve on and what strategies you'd like to try. As you complete this activity think about how productive you are (or would like to be) with your phone calls, emails, time management within your calendar, peak energy level, daily/weekly routines, and utilizing your environment to your advantage. Then review your reflection with your supervisor or onsite trainer to see how they can support you with the things you feel you could improve.

What I Currently Do to Maximize Productivity and Where/How I'm Most Productive

What I Can Do to Maximize Productivity and Where/How I Can Be More Productive

Strategies to Try to Maximize My Productivity

✓ *When you have finished with this activity please review any questions you have with your supervisor or onsite trainer and proceed to the next course.*

▶ **Putting Yourself First**

Please check out the "Taking Care of You" resources on the EITP website (http://go.illinois.edu/SCOnline8). Then reflect on some of the things you feel you are already good at with this exercise and some of the things you think you would like to try. Be sure to review your reflections with your supervisor to see what other supports may be available in your office and how they can support you.

What I Already Do to Take Care of Myself

What Supports and Strategies I Could Use to Take Better Care of Myself

⊘ *When you have finished with this activity please return to the next course in the training.*

Check-in

Section 8 provided information that relate to your ability to implement the IFSP, monitor the IFSP and balance multiple projects and priorities.

| 1 means you feel unsure about the topic and would like to learn more before you start working with families. | 1 2 3 4 5 | 5 means you feel very confident in your understanding and ability. You feel equipped with the tools ready to start working with families! |

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention

REFLECTION 1: Implementing the IFSP

Rate yourself between 1 and 5 on each of the following skills:

a. **Discerning what are (and are not) covered EI services**   _____

b. **Knowing how to authorize ongoing services**   _____

c. **Understanding the use of IFSP Development time**   _____

REFLECTION 2: Monitoring the IFSP

Rate yourself between 1 and 5 on each of the following skills:

a. Understanding my role in the ongoing monitoring of the IFSP _____

b. Carrying out my duties for IFSP reviews _____

c. Taking a lead role to encourage teaming and collaboration _____

REFLECTION 3: Balancing Multiple Projects and Priorities

Rate yourself between 1 and 5 on each of the following skills:

a. Organizing myself and my time (organizational skills) _____

b. Prioritizing responsibilities any given day, week or month _____

c. Setting boundaries and expectations for yourself and others _____

d. Implementing self-care strategies _____

✓ *This concludes the workbook activities for Section 8. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.*

Section 9: Transition, Exit Meetings and Case Closure

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnline9

Section 9 Outline

Module 1: Transition

       Overview of Transition Activities

       Transition Options

       Transition Roles and Responsibilities

       Partnering with Families, Providers, and LEAs

       Special Timelines

Module 2: Exit Meetings

       Exit IFSP Meeting – Voluntary Withdrawal

       Exit IFSP Meeting – Upon Review

Module 3: Transfer and Case Closure

       In-State Transfers

       Out-of-State Transfers

       Closure

Closing Summary

Service Coordination page: http://go.illinois.edu/ServiceCoordination
Service Coordination Online Resources page: http://go.illinois.edu/SCOnlineResources

Using *When I'm Three, Where will I Be?*

Step 1:

Familiarize yourself with the *When I'm Three, Where will I Be?* workbook (http://go.illinois.edu/SCOnline9) and identify the pages that you would like to highlight with families when you are planning for transition activities with them. You may even want to fold over pages that are your favorites and use that as your master copy as you learn to use this as a tool to support families during transition.

> **My Favorite Pages to Show Families in *"When I'm Three, Where will I Be?"***

Step 2:

In the space below note the ways you might be able to use the workbook with the family during transition planning meetings and during monthly contacts with families approaching transition as a conversation starter. For example, you might want to fill out some of the important contact information in the front of the book to get a family started. Other ideas include choosing to go over the parent checklists during your monthly contacts with families and/or reminding families to complete checklists in preparation for various transition activities (e.g. *transition planning meetings, school visits and the IEP meeting).*

> **Beyond introducing the workbook, I plan to use it with families during the following activities:**

> **Pages in workbook I will complete with families during preparation for transition activities**

Step 3:

Check in with a peer, supervisor or onsite trainer to review the ways they use the *When I'm Three, Where Will I Be?* workbook with families. Find out what pages they like to highlight and how/when they complete various activities within the workbook with families.

> **Additional Ideas from Peers**

When you have finished with this activity, please return to the next course in the training.

Exploring Transition Options

Take a few minutes to explore the various transition options that might be available to families you serve. You may need to rely on a peer, supervisor or onsite trainer to help you learn more about these options.

> *Tip: Find out if there is someone in your office such as a parent liaison or LIC Coordinator who can help you learn more about these transition options.*

Part B Related Services and/or Resource Services

Local Education Agencies (LEAs), school districts, and early childhood special education cooperatives that I am likely to work with given the location of the families I serve:

Important contact information for LEA representatives (or where this information can be found at your office):

Other important notes about these transition options for families I serve:

Private Preschool & Community Programs

Ways I can help families exploring private preschools near them:

Community programs, such as Head Start, in the communities I serve include:

Private Therapy

When a family wants to continue with private therapy, these are the ways I can help them:

Early Intervention providers and/or agencies that provide services to children over the age of three in the areas I serve include:

<div style="border:2px solid black; padding:10px;">

Community Resources

Other community resources, such as park district programs, library activities, community play groups and preschools, that serve families in the catchment area I serve include:

Who at my office can help me stay up-to-date on these resources?

</div>

✓ *When you have finished with this activity, please return to the next course in the training.*

▷ Documentation & Transition Tracking Activities

Please familiarize yourself with all track and documentation activities that service coordinators are responsible for during the transition process. Observe a peer, supervisor or onsite trainer as they complete the PA34 screen and EI-EC Transition Tracking Form during the various steps in the transition process. Use the space below to document the date you observed the following activities. Then revisit the workbook and document the date you performed these transition activities for family's you serve.

Documentation/Tracking Activity:	Date Observed:	Date Completed:
Initiating Transition with Families • Having conversation with the family • Introducing *When I'm Three Where Will I Be?* Workbook, and *Educational Rights and Responsibilities: Understanding Special Education in Illinois* • Documenting conversation (how, when and where)		
Obtain Parental Consent		
Prepare Transition Referral Packet		
Document Transition Activities *(in PA34, case notes and EI-EC Tracking Form)*		
Review Transition Options and Consequences for Delaying Transition Timelines with a Family who Declines Transition Activities *(Remember to let other team members know about decision, so they can help by engaging in ongoing discussions with families and attempt to address their questions and concerns)*		

Documentation/Tracking Activity:	Date Observed:	Date Completed:
Develop Unique and Individualized Transition Related Outcomes and Strategies *(updated as needed)*		
Schedule, Attend and Facilitate Transition Planning Conference		
Receive EI-EC Transition Tracking Form from LEA and Update Documentation in Electronic Record		

(✓) *When you have finished with this activity, please return to the next course in the training.*

▷ ## Reflection on Special Circumstances – What can you do?

If one of these special circumstances is something you have already faced, then reflect on the case notes, the steps you took to inform the family of their options, and how you documented the discussions and activities that took place. **Given what you know about your roles and responsibilities with transition, is there anything you could improve upon in your communication with families and/or your documentation of the special circumstances?**

If you haven't experienced any special circumstances with families transitioning from early intervention to early childhood special education, then take a few minutes to connect with a supervisor or onsite trainer to discuss the steps you might take to ensure families are aware of their rights and every activity is documented accordingly.

(✓) *When you have finished with this activity, please return to the next course in the training.*

▷ ## Responding to Voluntary Withdrawal

Imagine for a moment that you are going through your monthly phone calls and you reach a family who says one of the following:

I'm so glad you called because I think we have met all our outcomes and no longer need services!

OR

This program has been great, but we have a lot going on right now and would prefer to stop EI for personal reasons.

Take a few minutes to document some ways you might respond in space provided below.

How would you respond?

What open ended questions might you ask?

What would you say if the family doesn't feel the need to meet for the exit meeting?

✓ *When you have finished with this activity please return to the presentation and press "play".*

Module: Exit Meetings   **Upon Review**

▷ ## Reviewing Child Outcomes to Evaluate Discharge from EI

Read the scenario below and respond to the following questions in the space provided.

SCENARIO

During a periodic review, the team begins by reviewing family priorities and existing IFSP outcomes. It soon becomes apparent that all outcomes have been met, no new priorities have been identified and no new outcomes are developed. The team agrees it is time to consider discharging the child and family from EI but first they will the 3 child outcomes and progress made towards each of them.

How would reviewing the progress on the 3 child outcomes with the team ensure that no additional priorities are overlooked?

Why would the review of child outcomes help the team feel confident about the discharge of the child and family from EI services?

What tools might you rely on to help facilitate this discussion?

✓ *When you have finished with this activity please return to the presentation and press "play".*

▷ ## In-State Transfer Resource

Please review the listing of activities for families moving within Illinois who are leaving or entering your CFC catchment area on the following page. This is also found as an **editable** Microsoft Word document at http://go.illinois.edu/SCOnline9. In the space provided, list other activities that may be specific to your CFC.

✓ *When you have finished with this activity, please return to the next course in the training.*

▷ ## Out-of-State Transfer Resource

Please review the handout related to out-of-state transfer activities and questions to ask when working with families moving out of the state found on the following pages and on resource page for this section (http://go.illinois.edu/SCOnline9) as an **editable** Microsoft Word document. In the space included, please list other activities or questions to ask that may be specific to your CFC.

✓ *When you have finished with this activity, please return to the next course in the training.*

In-State Transfer Resource

When a family **LEAVES** your CFC catchment area but is moving within Illinois, complete the following activities:	When you **RECEIVE** a transferred record for a family moving to your CFC catchment area, complete the following activities:

Please note that exit data is not required for this type of transfer.
 	
 ☐ Obtain the family's new address
 ☐ Identify the new CFC office the family is transferring to via Child Find or http://go.illinois.edu/CFCListing
 ☐ Share contact information for new CFC office with family
 ☐ Update family's primary & secondary address in Vstone
 ☐ Alert service providers of transfer
 ☐ Request summary reports from providers, if necessary
 ☐ Notify the new CFC office of the transfer via courtesy call
 ☐ Write a letter to send with the file to the receiving CFC that includes the following:
     o Child's name
     o Family contact information
     o Vstone participant ID number
     o EI number
     o IFSP dates
     o Next Review Due
     o Services on the IFSP
     o Providers continuing with family
 ☐ Print case notes, IFSP report, participant enrollment report for permanent record
 ☐ Review record with CFC manager
 ☐ Copy and forward permanent record along with your letter to new CFC (originals remain with your CFC)
 ☐ If applicable, discontinue service authorizations and notify providers in writing of the discontinued auth
 ☐ Verify that record has been received by the other CFC office and remove the family's information assigned to you
 ☐ **NEVER** close the record in Vstone
	☐ Perform Vstone In-State Transfer activities outlined on **flow sheet EI4 and EI4A** *(these activities may be completed by a designated person in your CFC)*
	 ☐ Review record to make sure you received all components of the record.
	     o Referral and intake history in
	     o Consent forms
	     o Printed case notes report
	     o Evaluations/Assessments
	     o IFSP
	     o Insurance and Family Participation Fee information
	     o Other info as needed
	 ☐ Familiarize yourself with the IFSP, services identified on the IFSP and upcoming activities (i.e. IFSP review, transition, etc.)
	 ☐ Contact the family within 2 days of receiving the record
	 ☐ Learn about the family's priorities, needs and discuss strategies that will minimize disruption of EI services
	 ☐ Verify income and insurance information as this may have changed if the move was a result of a job change
	 ☐ If needed, schedule a meeting with the family and new IFSP team members once identified
	 ☐ Update the CM10 screen which is the IFSP cover page to reflect updated information
	 ☐ Obtain consent to release records to new service providers and physician (if applicable) and distribute IFSP and reports accordingly

Other activities my CFC office expects for an in-state state transfer to another CFC include	**Other activities my CFC office expects when I am assigned a family from another CFC include:**

Out-of-State Transfer Resource

Questions to Ask a Family Moving Out of State:

❓ What state are you moving to?

❓ What will your new address be (obtain the full address, including zip code and county)

❓ When will the move occur?

❓ Have you notified the other team members yet?

❓ When is the last day that you anticipate receiving EI services and supports in Illinois?

❓ Will your number change? If so, what is the best number to reach you in the new state?

❓ When would be a good time for us to schedule an exit IFSP meeting?

Other Questions:

❓

❓

❓

Out-of-State Transfer Activities

☐ Identify the new EI system for family at http://ectacenter.org/contact/ptccoord.asp

☐ Gain consent to release their information to the new EI System

☐ Share contact information with the family for the new EI System

☐ Make copies of the child/family records (including case notes which need to be printed out)

☐ Provide a copy of the child/family's record to them and/or with consent send it on to the new EI System

☐ Connect with the family to confirm the date they officially moved out of state before closing the record

☐ With permission connect with the new EI System to answer any questions and confirm the materials were received before closing the record

☐ Once the family has moved out of state close the record and notify the providers of their modified authorization end dates (if applicable)

Other activities my CFC office expects for an in-state state transfer

Check-in

Section 9 provided information that relate to your ability to transitions, transfers, exit meetings and case closures.

1 means you feel unsure about the topic and would like to learn more before you start working with families.

1 2 3 4 5

5 means you feel very confident in your understanding and ability. You feel equipped with the tools ready to start working with families!

There are no wrong answers, just honest reflection for you only. Your responses can help you track/measure your own progress as you learn about your role in early intervention

REFLECTION 1: Transition

Rate yourself between 1 and 5 on each of the following skills:

a. **Understanding steps and timelines in the transition process** _____

b. **Individualizing transition plan/outcome to meet the family's needs and priorities** _____

REFLECTION 2: Exit Meetings

Rate yourself between 1 and 5 on each of the following skills:

a. **Knowing when child outcomes are completed** _____

b. **Documenting progress toward each child outcome** _____

c. **Understanding when and in what circumstance regular scheduled meetings can turn into exit meeting** _____

REFLECTION 3: Transfers and Case Closures

Rate yourself between 1 and 5 on each of the following skills:

a. **Knowing what do to when a family moves into a different service area within the state** _____

b. **Knowing the steps to take when a family moves out of state** _____

c. **Understanding how and when to close a family's record upon exit from early intervention** _____

This concludes the workbook activities for Section 9. Please remember to review any follow up questions you may have about what you learned in this section with your supervisor or onsite trainer.

SC Online Closing

Links and resources for this course section can be found at:

http://go.illinois.edu/SCOnlineResources

Illinois SC Community of Practice (online)

The Illinois Service Coordination Community of Practice (IL SC CoP) is a place for current service coordinators working in the Illinois Early Intervention System **to partner and support each other in their work**. EITP co-hosts and facilitates this group with a small group of leaders who have been self-identified. Members include service coordinators, lead service coordinators and some SC supervisors, who also continue to serve families as a service coordinator in some capacity. IL SC CoP members connect via **quarterly virtual meetings** and discussion topics are identified by group members shared interests and needs. Members also have an online workspace where they can connect, share resources and seek support from one another in between meetings: http://ilservicecoordinationcommunityofpractice.pbworks.com

Additional Training

EITP offers online and face-to-face trainings to support you and your role! Please visit the EITP Events page at https://go.illinois.edu/EITPevents and the Online Events at https://go.illinois.edu/EITPonline to register.

Recommended Face-to-Face Trainings:
- *Baby Steps and Building Blocks: Infant/Toddler Developmental Institute*
- *Family Assessment for Service Coordinators (RBI)*
- *Family-Centered Early Intervention Practices*
- *Painting a Picture: Writing Effective Early Intervention Reports*
- *Service Coordination and Family Assessment Institute*

Recommended Online Trainings:
- *Family Assessment in the Early Intervention System*
- *Using Your Facilitation Skills to Be an Effective Host*
- *Working with Interpreters & Translators in Illinois*

Visit https://go.illinois.edu/SCOnlineResources for a list of "**Ongoing Professional Development**" opportunities recommended by SCs in Illinois!

National Webinars

National Service Coordination Webinars are developed and hosted by a subgroup of the National SC Training Workgroup (consisting of representatives from Illinois EITP, Virginia, Iowa and New Mexico) and are for SCs and those who train and support them across the nation. EITP cofacilitated and hosted two national SC webinars in 2018 and hosts the National Service Coordinator Webinar Resource Page where all resources and archived recordings of these collaborative events are stored: http://go.illinois.edu/NationalSCWebinars

For additional resources related to your role as a Service Coordinator, please visit the
Service Coordination page http://go.illinois.edu/ServiceCoordination

CFC Conferences

EITP hosts 2 statewide conferences (North and South) for service coordinators, program managers and all other supports within the CFC offices in Illinois. Each conference includes a keynote speaker, topical breakout sessions and networking opportunities. Needs assessment information is collected throughout the year and used to guide
planning of each conference.

Trainings to Attend:

Your CFC Manager or supervisor might have trainings that they recommend! Please visit the EITP Events page at https://go.illinois.edu/EITPevents and the Online Events at https://go.illinois.edu/EITPonline to register.

Circle the name and add any more you like!

Recommended Face-to-Face Trainings:
- *Baby Steps and Building Blocks: Infant/Toddler Developmental Institute*
- *Family Assessment for Service Coordinators (RBI)*
- *Family-Centered Early Intervention Practices*
- *Painting a Picture: Writing Effective Early Intervention Reports*
- *Service Coordination and Family Assessment Institute*

Recommended Online Trainings:
- *Family Assessment in the Early Intervention System*
- *Using Your Facilitation Skills to Be an Effective Host*
- *Working with Interpreters & Translators in Illinois*

Recommended Trainings from My Supervisor:

Trainings that interest me the most: