

Assessment for Service Planning Checklist



This checklist has been developed to help you organize and complete all Part C requirements for the assessment for service planning process. This checklist is intended to be used as a companion tool after you have read the *Infant & Toddler Connection of Virginia Practice Manual*. For complete information about Assessment for Service Planning, please refer to the *Infant & Toddler Connection of Virginia Practice Manual, Ch. 6 - Assessment for Service Planning*.

Steps

- Explain the process for child and family assessment and IFSP planning, including the family's role, the service coordinator's role, and other team members' roles.
- Schedule the assessment for service planning.
- Explain and complete the *Notice and Consent for Assessment for Service Planning* form if you have not done so at the time of the Intake.
- Offer a copy of the *Notice of Child and Family Rights and Safeguards Including Facts About Family Cost Share*. Explain the parts that are relevant to this step in the process. (This form must be offered, but the family may decline to receive another copy of this form. Document the family's choice to decline in a contact note.)
- Optional: Provide the family with the *Confirmation of Scheduled Meetings/Activities* form to note the date and time of the scheduled assessment for service planning.
- If the family declines to proceed to the assessment for service planning:
 - Provide the family with the *Declining Early Intervention Services* form (check the second choice at the bottom portion of the form, "I understand that an IFSP can be developed for my child/family if my child is eligible for Part C...")
 - Offer a copy of the *Notice of Child and Family Rights and Safeguards Including Facts About Family Cost Share*. Explain the parts that are relevant to this step, including the complaint procedures. (This form must be offered, but the family may decline to receive another copy of this form. Document the family's choice to decline in a contact note.)
 - Provide the family with contact information for Part B services if the child meets age eligibility for school services.
 - Provide the family with referrals if interested in other programs.
 - Ask the family if you can share their decision with their pediatrician and/or referral source if permission was not previously obtained.
 - Document in ITOTS within 10 business days that the child was determined eligible but the family has declined services.
- Building on information gathered through referral and intake and using Virginia's family assessment tool questions, complete the family directed family assessment including information about the child/family's daily activities and routines, natural environments, and family priorities, resources and concerns. (Inform the family that information about concerns, priorities and resources is voluntary).
- Obtain physician referral/authorization if needed for assessment.

Assessment for Service Planning Checklist



- Identify assessment team members.
- Assess the functional needs and strengths of the child in all areas of development and the child's functional performance in the three child outcome areas including information gained through communication with the family, observation of the child, medical records and other available reports, and use of a comprehensive developmental assessment tool such as the HELP, ELAP, etc.
- Complete the required hearing and vision screenings, if not already completed.
- Complete the *Family Cost Share Agreement or Temporary Family Cost Share Agreement* if not done earlier.
- Facilitate determination of entry ratings and record these in the Team Assessment Narrative on the IFSP form.
- Enter into ITOTS information gathered during the assessment for service planning.
- If the results of the assessment for service planning indicate that the child is no longer eligible for Part C services:
 - Provide the family with the *Parental Prior Notice* form (check "Your child is not eligible for Infant & Toddler Connection of Virginia.")
 - Offer a copy of the *Notice of Child and Family Rights and Safeguards Including Facts About Family Cost Share*. Explain the parts that are relevant to this step. (This form must be offered, but the family may decline to receive another copy of this form. Document the family's choice to decline in a contact note.)
 - Provide the family with referrals if interested in other programs.
 - Ask the family if you can share the determination of ineligibility with their pediatrician and/or referral source if permission was not previously obtained.
 - Document in ITOTS within 10 business days that the child was determined ineligible at the assessment for service planning.
 - For Medicaid recipients, complete and provide the family with the *Early Intervention Services – Notice of Action* letter and explain to the family the right to appeal under Medicaid if they disagree.
- After assessment, give the family the *Parental Prior Notice* form (check "Your child is eligible for Infant & Toddler Connection of Virginia" and "A meeting to develop the initial IFSP (IFSP) is needed.").
- Offer a copy of the *Notice of Child and Family Safeguards Including Facts About Family Cost Share*. Explain the parts that are relevant to this step in the process. (This form must be offered, but the family may decline to receive another copy of this form. Document the family's choice to decline in a contact note.)
- Identify the ongoing service coordinator.
- Schedule the initial IFSP meeting within 45 days of referral unless there are mitigating family circumstances.

Assessment for Service Planning Checklist



- Work with the family to identify the IFSP team members.
 - Determine if there is a need for a translator or interpreter.
 - Give the family a copy of the *Confirmation of IFSP Schedule* form on which the IFSP team members are indicated.
 - Notify all IFSP team members in writing.
- Assist the family in preparing for the IFSP meeting.

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