

Service Coordination CSR Documentation Requirements

Documentation of all Service Coordination activities are critically important to ensure all aspects of IDEA, Part C are being met.

Service Coordinator Responsibilities

It is important for Service Coordinators to ensure all CSRs are written in a succinct, factual, and non-judgmental manner. All information documented in CSRs is subject to disclosure at any point in time. As a result, it is important to note that ALL CSRs should be written knowing they could be viewed in court at any point in time.

Intake

- On a monthly basis, CSRs for interim Service Coordination must be created in the ITPKIDS Provider CSRs section to document all interactions regarding assigned cases.
- Service Coordinators have the option of completing one CSR for an entire month of activities or one CSR per activity completed during the month based on your hub's process. Once the month activities have ended, Service Coordinators have 15 days from the completed activity to create and submit their CSRs in ITPKIDS.
- Documentation in Interim Service Coordination CSRs should include:
 - ALL interactions with parent/guardians
 - If applicable, all interactions with Child Welfare
 - SC staffing of assigned children in MDT meetings
 - Documentation that all IDEA, Part C required procedural safeguards have been completed and FULLY explained to families:
 - Prior Written Notices
 - Letters of Invite
 - Consents for screening, evaluation, child assessment, and family assessment
 - Financial Resources form – Consent to bill
 - System of Payment Policy
 - Disclosure form – Consent to share information
 - HIPPA – Notice of Privacy Practices
- Documentation must include the Child and Family Safeguards brochure being provided and FULLY explained to families.
- If the child is determined eligible for ITP, documentation must include all correspondence regarding scheduling of the initial IFSP, holding the initial IFSP meeting, and if delayed past the 45 day timeline, a detailed description of why the development of the IFSP was delayed.

Enrolled

- On a monthly basis, CSRs for ongoing Service Coordination must be created in the ITPKIDS Provider CSRs section to document all interactions regarding assigned cases.
- Service Coordinators have the option of completing one CSR for an entire month of activities or one CSR per activity completed during the month based on your hub's process. Once the month activities have ended, Service Coordinators have 15 days from the completed activity to create and submit their CSRs in ITPKIDS.

- Face-to-face contact must be made with families at least every 90 days (more frequent if the need exists) and documented in a CSR.
- Contact must be attempted at least monthly by phone, text, or email (based on family preference) with families (more frequent if the need exists) and documented in a CSR.
- If applicable, documentation of the Entry Early Childhood Outcome process.
- Documentation must include the explanation of ITP providing families with the opportunity to provide feedback on early intervention services their child and family receives and to offer suggestions on ways to improve the program.
- Documentation in ongoing Service Coordination CSRs should include:
 - ALL interactions with parent/guardians
 - If applicable, all interactions with Child Welfare
 - SC staffing of assigned children in MDT meetings
 - Documentation that all IDEA, Part C required procedural safeguards have been completed and FULLY explained to families:
 - Prior Written Notices
 - Letters of Invite
 - Consents for screening, evaluation, child assessment, and family assessment
 - Financial Resources form – Consent to bill
 - System of Payment Policy
 - Disclosure form – Consent to share information
 - Prior to the Six Month IFSP Review, documentation to notify families they can complete the family survey electronically via emailed or text link and provide them with their child's unique client ID.
 - Documentation of all Part C IFSP requirements:
 - Creation of Annual IFSPs, and if applicable, detailed description of Annual IFSP late reason
 - Creation of IFSP Addendums
 - Oversight of the implementation of the IFSP to include timely services, wait list, interruption in services, change in service provider, etc.
 - Six Month IFSP Reviews, and if applicable, detailed description of Six Month Review late reason
 - Prior Written Notices
 - Letters of Invite
 - Documentation of all Part C Transition requirements:
 - IFSP contains transition steps and services, and if applicable, a detailed description of why the IFSP did not contain transition steps and services at least 90 days prior to the child's third birthday, and at the discretion of all parties, not more than 9 months before the child's 3rd birthday.
 - Transition conference, and if applicable, a detailed description of why the Transition Conference was not held at least 90 days prior to the child's third birthday, and at the discretion of all parties, not more than 9 months before the child's 3rd birthday.
 - Prior Written Notices
 - Letters of Invite
 - Disclosure form – Consent to share information
 - Part B Transition Packet Cover Sheet if child is Part B Potentially eligible

Exit

- If applicable, documentation of the Exit Early Childhood Outcome process
- Prior Written Notices
- Case closure