



## SERVICE COORDINATION SELF-ASSESSMENT

### Purpose

The purpose of the self-assessment is to provide service coordinators a tool to evaluate their practices used from intake through transition and case closure. This tool was developed in conjunction with a workgroup of service coordinators, point of entry managers and parents. The checklist is divided into four key sections designed to review service coordination responsibilities and identify best practices and areas for potential growth and training.

Julie Brooks & Melissa Hardison  
Kentucky Early Intervention System

**Directions:** Read each step in the process and indicate the number that best fits how you feel each statement represents your work. There are no right or wrong answers. The scoring is not weighted and is intended to provide input on progress toward mastery. *The bold items are related to the Service Coordination Performance Standards.*

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<b>1.0 Coordinating Intake, Screening and Developmental Evaluations</b>						
<i>Ability to implement the practices that support and empower families, encouraging their role as decision-makers and assist them in securing supports and services throughout the early intervention process.</i>	Explains the purpose of the intake meeting to the family.					
	<b>The Intake meeting is scheduled at a time, date and location that was convenient for the family.</b>					
	<b>Provides a description of the state-wide early intervention system in Kentucky including:</b>					
	<b>The organizational structures that support KEIS;</b>					
	<b>State Regulations;</b>					
	<b>Federal Regulations;</b>					
	<b>Federal Child Outcomes;</b>					
	<b>Federal Family Outcomes; and</b>					
	<b>Role of different professional disciplines.</b>					
	<b>Describes the eligibility determination process to the family including:</b>					
	<b>The 3 ways that children can be found eligible: Developmental Delay, Established Risk Condition or by Informed Clinical Opinion;</b>					
	<b>The evaluation requirements;</b>					
	<b>Explaining to parents that eligibility is not just the test results alone, but a synthesis of the evaluation results, parent report, child's present levels of development, medical records and health information;</b>					

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	<b>Clarifying that a developmental evaluation is provided at no cost to the family;</b>					
	Advising the family that information they share about their child’s skills is very important since they see their child in multiple settings and over time; and					
	Determining the need for a hearing evaluation. If so, explains that the assessment cannot be scheduled until the child's hearing status is confirmed.					
<b>Introduces the IFSP explaining:</b>						
	<b>Natural environments;</b>					
	<b>Consultative model of service delivery;</b>					
	<b>Primary service provider model;</b>					
	<b>45 day timeline;</b>					
	How information gathered from the family is used to develop IFSP outcomes, strategies and services; and					
	<b>That providers will work directly with parents/caregivers ensuring that they are active participants in Early Intervention.</b>					
	Discusses the family's preferred method for sharing and receiving information (including parent portal).					
	<b>Reviews procedural safeguards, confidentiality and family rights, including conflict resolution options, with the family and provides a copy of the family rights handbook.</b>					
	Explains the KEIS system of payments.					

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	Collects financial information.					
<b>Describes that a Service Coordinator is the single point of contact and is responsible for:</b>						
	<b>Assisting parents of infants and toddlers with disabilities in obtaining access to needed early intervention services and other services identified in the IFSP;</b>					
	<b>Making referrals to providers for needed Services;</b>					
	<b>Scheduling appointments for infants and toddlers with disabilities and their families;</b>					
	<b>Explaining all notices;</b>					
	<b>Obtaining consent for early intervention Services;</b>					
	<b>Scheduling and facilitating all meetings; and</b>					
	<b>Ensuring that services are provided according to state and federal regulations.</b>					
<b>Interviews the family to obtain:</b>						
	<b>Family background, ethnicity and language Preference;</b>					
	<b>Family structure and composition;</b>					
	<b>Family's developmental concern for the child;</b>					
	Information regarding the pregnancy, birth and current health of the child; and					
	<b>Other agencies and professionals involved with the child.</b>					
<b>Explains the necessary forms and obtains written consent for:</b>						
	Screening, evaluation and assessment (including the family assessment);					
	Requesting medical records;					
	Billing insurance; and					

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	Sharing child outcome data.					
	<b>Ensures that families understand that their consent is voluntary, may be revoked at any time, and helps them understand that consent must be obtained in order for certain actions to occur.</b>					
	Ensures the completion of a developmental screening (ASQ 3; ASQ: SE; and OAE, <i>as needed</i> ).					
	Explains the importance of the Family Assessment and its use to produce family-driven IFSP outcomes.					
	Schedules a tentative date for the Family Assessment at a time and location that is convenient for the family and provides the family with the Family Preparation Letter (FS-47).					
	Points out that an IFSP meeting may be held to discuss assessment results (both the initial evaluation and the family assessment) and that this information will be used to determine outcomes that will be addressed through early intervention services on the IFSP.					
	Schedules a tentative date for the IFSP meeting at a time and location that is convenient for the family and provide the family with the IFSP Meeting Notice Form (FS-14).					
	Explains to the family that the Family Assessment and IFSP meetings may not be necessary if their child is not found eligible for early intervention services.					

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	<b>Confers with the family that transition refers to the events, activities, and processes associated with key changes between environments or programs during the early childhood years and the practices that support the adjustment of the child and family to the new setting.</b>					
	<b>Assures that the family understands the timeframe for transition from early intervention and when transition planning should occur to support successful adjustment and positive outcomes for both the child and family.</b>					
	<b>Asks the family open-ended questions and facilitates discussions to check the family's understanding of the early intervention system and enrollment process.</b>					
<b>Post Intake Activities</b>						
<b>Documents the intake meeting in the service log including:</b>						
	Any decisions that were made;					
	Notices and consents that were given;					
	Topics that were discussed; and					
	Plans for further action.					
	<b>Each intake service log should be individualized and include specific information that the family requested.</b>					
	<b>If hearing concerns were noted and a hearing evaluation is necessary, ensures a hearing evaluation is completed and the POE obtains the results of the evaluation in order to determine how to proceed with the developmental evaluation.</b>					

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	Reviews the child's hard copy early intervention record to determine if the medical information is complete. If not, requests child's health and medical records from the appropriate sources.					
Reviews the child's electronic early intervention record on TOTS for completeness of the following:						
	Demographic page;					
	Consent section of referral page;					
	Parent page (including e-mail address);					
	Financial page;					
	Health page (including descriptions of the child's general health and any health concerns that may impact daily routines and activities.); and					
	Screening page.					
	Reviews the screening results to determine the next steps.					
Ensures the initial evaluation is:						
	Completed timely; and					
	Documented on the Evaluation/Assessment Page.					
	An eligibility decision is completed timely.					
	<b>If the child is determined not eligible, ensures a Notice of Action (FS-9) is completed; mailed to the family and includes a copy of the Parent's Rights brochure.</b>					
If the child is determined eligible:						
	Contact the family to confirm the previously scheduled family assessment and IFSP dates;					
	Review the purpose of the family assessment;					

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	Provide an explanation of the purpose of the IFSP meeting; and					
	Ask the family if there is anyone else they would like to invite to the IFSP meeting.					
<b>COORDINATING INTAKE, SCREENING, AND DEVELOPMENTAL EVALUATIONS TOTAL =</b>						
<b>2.0 Assessing the Family for Service Planning</b>						
<i>Ability to conduct the family assessment to assist the IFSP team in identifying the early intervention services necessary to meet the unique needs of the child and family</i>	<b>Gathers information from the family about family structure and composition, and any other agencies and professionals involved with the child (Formal and Informal Supports)</b>					
	<b>Conducts the family assessment by:</b>					
	<b>Interviewing the family about their daily routines and activities;</b>					
	<b>Identifying how the child relates to others;</b>					
	<b>Discovering how the child uses knowledge and skills and gets his/her needs met;</b>					
	<b>Pinpointing the child's participation level in their activities;</b>					
	<b>Interviewing childcare staff about child's engagement, independence and social interactions while in childcare (if applicable);</b>					
	<b>Using open-ended questions to encourage the family to share their thoughts and concerns;</b>					
	<b>Asking strength-and-interest based questions;</b> <b>Discussing the family's concerns;</b>					



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	<b>Reviewing the family's priorities;</b>					
	<b>Discovering the family's resources; and</b>					
	<b>Helping the family to determine IFSP outcomes they want to work on within routines and activities.</b>					
	Completes the family assessment page on TOTS.					
	Enters a service log to document the family assessment meeting.					
	Provides a copy of the family assessment report to the family.					
	Provides a copy of the family assessment notes to the service providers on the IFSP team.					
<b>ASSESSING THE FAMILY FOR SERVICE PLANNING TOTAL =</b>						
<b>3.0 Developing and Monitoring the Individualized Family Service Plan (IFSP)</b>						
<i>Ability to work effectively and consult with a variety of early intervention team members and community partners for service planning and implementing integrated intervention strategies, supports and services for children and their families.</i>	<b>Ensures the selection of appropriate disciplines for the IFSP team.</b>					
	Contacts potential team members regarding their availability to provide services and notifies them of the date, time and location of the IFSP meeting.					
	Explains to the providers that the family assessment has been completed and can be reviewed for information about the potential IFSP outcomes.					
	Reminds the provider(s) that they will be asked for input on criteria and data collection methods.					

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Facilitates the IFSP meeting by:					
<b>Describing the steps of the IFSP process, including the purpose of the IFSP and what service delivery might look like;</b>					
Clarifying that the family is an equal member of the IFSP team;					
<b>Reviewing family rights and procedural safeguards, and provides a copy of the Family Rights Handbook (unless the family declines to receive a copy because they already have one);</b>					
<b>Explaining the rationale for services in natural environments;</b>					
<b>Identifying the natural environments where services will take place;</b>					
<b>Going over the child's present level of development across all domains;</b>					
Summarizing family assessment results in terms of the child's social relationships, engagement, and independence in everyday routines;					
Identifying early intervention services that will be provided including the primary service provider;					
<b>Establishing the service delivery structure: time, place, length and frequency of intervention sessions, taking into consideration the family's schedule and the outcomes/routines that are impacted;</b>					

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	Determining the provider's data collection methods and the timelines for progress monitoring; and					
	Obtaining written consent for the early intervention services on the IFSP signature page (FS-15).					
<b>Formulating IFSP outcomes that:</b>						
	<b>Reflect the family's priorities;</b>					
	<b>Are written using active language that describes what the behavior should look like;</b>					
	<b>Are written using language that describes the routine(s) in which the behavior occurs;</b>					
	Are written using a measurable, functional Criterion;					
	Address child needs (Child-level outcomes); and					
	Address family needs (family-level outcomes).					
	At least 6-10 IFSP outcomes are included on the IFSP.					
<b>Ensures the IFSP includes a transition outcome that:</b>						
	<b>Addresses upcoming changes that facilitates a smooth, seamless transition into, within, and out of early intervention services;</b>					
	Is written appropriately based on the age of the child and type of transition outcome (child-level vs. family-level); and					

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	<b>Identifies concerns and discusses steps to prepare the family for choices/options at different transition points and to prepare the child for participating in the new setting when transition occurs.</b>					
	Schedules IFSP review meetings timely to prevent a lapse in services and ensures all IFSP members are aware of the review.					
	<b>Completes the IFSP meeting note box including:</b>					
	Specific information related to the IFSP team decisions that were made including frequency, length and duration of services;					
	Topics that were discussed including any changes that are made to IFSP outcomes and transition action steps;					
	Documentation of any notices and/or consents that are given; and					
	Any specific information that the family requested.					
	Completes Outcomes page on TOTS.					
	Completes Planned Services page on TOTS.					
	Once the IFSP is completed, enter a service log to document the meeting on TOTS.					
	Provides a copy of the IFSP to the family.					
	<b>Six-Month Review IFSP</b>					
	<b>Prior to the end of the initial IFSP plan period the SC:</b>					
	Contacts the family and updates the family assessment by reviewing the family's priorities, concerns and daily routines;					

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	<p><b>Reviews the file and ensures that each provider on the IFSP team completes a progress report that includes on-going progress monitoring data for the IFSP outcomes and addresses present levels of development; and</b></p>					
	<p>Obtains updated financial supports information.</p>					
	<p>During the review meeting, the IFSP team discusses the current outcomes and makes changes as needed.</p>					
	<p><b>Provides a Notice of Action (FS-9) to reflect changes in service delivery.</b></p>					
<p><b>Annual IFSP</b></p>						
	<p>Prior to the end of the six-month plan period, the SC ensures that an annual determination of eligibility has occurred.</p>					
	<p><b>If the child's eligibility does not continue, ensures a Notice of Action (FS-9) is completed, mailed to the family and includes a Parent's Rights Brochure.</b></p>					
<p>If the child's eligibility continues the SC:</p>						
	<p>Schedules a family assessment and completes the RBI following the process outlined above;</p>					
	<p><b>Ensures that each provider on the IFSP team completes a progress report that includes on-going progress monitoring data; and</b></p>					
	<p>Obtains updated financial supports Information.</p>					

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	Facilitates the Annual IFSP meeting as outlined in the IFSP Development section (as listed above).					
	<b>Provides a Notice of Action (FS-9) to reflect changes in service delivery.</b>					
<b>Requested Review IFSP</b>						
	Ensures the reason for the requested review IFSP is clearly documented.					
	<b>Provides a Notice of Action (FS-9) to reflect changes in service delivery.</b>					
	If the requested review IFSP results in a change in planned services ensures that a copy of the IFSP is mailed to the family in a timely manner.					
<b>Oversight of Early Intervention Practices</b>						
Monitoring initial IFSP Services by:						
	Ensuring initial IFSP services start within timelines. The SC will monitor the service log page in TOTS no later than the 20th day after the parent gave consent on the IFSP; and					
	Following-up with the family and provider if services have not started to identify the reason for any potential delay.					
Monitoring On-going IFSP Services by:						
	<b>Quarterly reviewing the early intervention record to ensure services are being provided as authorized on IFSP planned services; and</b>					

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	Making regular phone calls to the family to discuss services or address any challenges the family may be experiencing. Encourage the family to ask questions and share their observations about the early intervention services, the providers and the family's perspective on the child and family progress.					
	<b>Facilitates the use of conflict resolution techniques and assists the family to file for mediation/due process.</b>					
	<b>The SC helps to facilitate the family's participation in available community supports including parent support groups, community partners/programs, and outpatient services. Link the family with other supports and services, if needed.</b>					
<b>DEVELOPING AND MONITORING THE IFSP TOTAL =</b>						
<b>4.0 Planning for Transition</b>						
<i>Ability to implement transition planning with the family that identifies the events, activities, and processes associated with key changes between environments or programs during the early childhood years.</i>	Provides a Notice of Transition (FS-11).					
	Obtains consent from the family to share information including evaluation and assessment information and copies of the IFSP with potential service providers.					
	Ensures the transition conference is held up to 9 months but at least 90 days prior to the child's third birthday.					
	Schedules a transition meeting to be held in conjunction with a naturally occurring IFSP meeting at a date, time and location that is convenient for the family.					

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	<b>Identifies concerns and discusses steps to prepare the family for choices/options at different transition points.</b>					
	<b>Helps the IFSP team develop a transition plan, which includes the outcomes and activities to prepare the child and family for participating in the new setting when transition occurs.</b>					
	<b>Helps the family identify community and specialized services for which the child and family may be eligible; and arranges visits for the family to those community and/or school placements.</b>					
	Ensures that the transition screen on TOTS is complete.					
<b>Case Closure</b>						
	<b>The Notice of Action (FS-9) is provided to the family regarding the end of early intervention services prior to the child's exit.</b>					
	The reason for action is written using clear and concise language and complete sentences.					
<b>Record closure on TOTS:</b>						
	Ensures that all service notes, exit assessments, and discharge reports have been entered into TOTS;					
	Reviews the TOTS record to ensure that the most appropriate reason for exit is documented using the policy and procedure guidelines for case closure; and					



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	Completes the Transition page in TOTS with the exit/close date and reason and document the reason for exit in the note box.					
<b>PLANNING FOR TRANSITION TOTAL =</b>						
<b>TOTAL ALL AREAS =</b>						

## Scoring

Task	Area of Significant Strength	Area of Moderate Strength	Making Progress Toward Fidelity	Opportunity for Improvement
Coordinating Intake, Screening and Developmental Evaluations	288 - 259	258 - 202	201 - 144	< 144
Assessing the Family for Service Planning	56 - 50	49 - 39	38 - 28	< 28
Developing and Monitoring the Individualized Family Service Plan (IFSP)	220 - 198	197 - 154	153 - 110	< 110
Planning for Transition	52 - 47	46 - 36	35 - 26	< 26
<b>TOTAL SCORE</b>	616 - 554	553 - 431	430 - 308	< 308
	100 - 90%	90 - 70%	70 - 50%	< 50%

<b>Commitment to Professional Growth and Development:</b>
<b>Trainings attended in the last year:</b>
<b>Targeted training for next year:</b>
<b>Plan for further action:</b>

<b>The following resources were used in the development of this document:</b>
<i>Infant &amp; Toddler Connection of Virginia, comprehensive system of personnel development core competencies.</i> (2009). Retrieved from <a href="https://www.veipd.org/main/pdf/Core_Competencies_FINAL-2-5-09.pdf">https://www.veipd.org/main/pdf/Core_Competencies_FINAL-2-5-09.pdf</a>
<i>Relationship of Quality Practices to Child and Family Outcome Measurement Results</i> (Lucas et al. 2011).
<i>SC Toolkit Checklists</i> (updated 5-14-12)- Developed by the University of Connecticut Center for Excellence in Developmental Disabilities University of Connecticut A. J. Pappanikou Center for Excellence in Developmental Disabilities Education, Research and Service
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