

Early Intervention Targeted Case Management Implementation Checklist

Topic	Specific Actions	Date	Who	Completed
Provider Enrollment	Determine which agency(ies) will provide EI TCM	August/Sept.	LLA	
	Send completed form listing agency(ies) that will provide EI TCM to Jeff Beard at jeff.beard@dbhds.virginia.gov and Beth Tolley at beth.tolley@dbhds.virginia.gov	August 15, 2011	LLA	
	Sign and date a new EI Provider agreement and email or fax that to Jeff Beard at jeff.beard@dmas.virginia.gov or 804-612-0043 (fax). Jeff will add the specialty code 119 to their file in the Medicaid MMIS system.	September 1, 2011	Agencies that will provide and bill for EI TCM	
	Add Specialty Code to the Provider file in MMIS (DMAS data system)	October 1, 2011	Jeff Beard	
Billing	Infrastructure in place in order to bill for EI TCM starting in October. Billing code is T2022	October 1, 2011	Agencies that will provide and bill for EI TCM	
	Billing for ID or MH TCM and 90 day TCM can occur for TCM Services provided through September 2011		Current TCM Providers	
	ID or MH TCM cannot be billed for TCM Services provided after September 30, 2011 for children in the early intervention system unless they receive more services through ID or MH programs		Agencies that will provide and bill for EI TCM	
Forms	Integrate new/ revised forms into electronic record system	October 1, 2011	Systems that use electronic records	
	Replace blank July 2010 IFSP forms with the revised IFSP forms. (Note: the existing forms can be continued for children whose IFSPs were developed prior to the availability of the revised IFSP form. The revised IFSP form must be used for all children who receive initial IFSPs on or after October 1, 2011. <i>Note: The revised IFSP is available and be used now, if desired. See http://infantva.org/Pr-PracticeManual-Forms.htm.</i>	October 1, 2011	System Managers, Service Coordinators	
Training	Participate in July 19, 2001 from 1:00 – 3:00 – Billing and Reimbursement Webinar	July 19, 2011 (or view recording)	Billing/ Reimbursement staff; Local Lead Agency Program and QA staff	
	Participate in August 18 or August 23 EI TCM Implementation Training Webinar	August 18 or 23, 2011	System Managers, Program Directors, Service Coordinators, Supervisors,	
	Provide questions to Beth Tolley and Jeff Beard prior to September 12, 2011 Question and Answer Session. System Mangers are asked to compile questions from their local system to forward to Beth and Jeff.	September 7, 2011	Fiscal Staff, Quality Assurance Staff	
	Participate in September 12, 2011 Question and Answer Session	Sept. 12, 2011		
Case Manager Certification	Take/pass the required new Early Intervention Certification Module. This module is expected to be available the first week in August.	August/Sept. 2011*	All practitioners who plan to provide service coordination (case	
	Complete online application for Early Intervention Case Manager	August/Sept		

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	Certification (after completing the required training module and completing the test with at least 80% accuracy)	2011*	management) in Virginia's EI system after September 30, 2011	
	<i>*The Part C staff will need to process about 400 applications so it is requested that the trainings and certification applications be completed as early as possible in August and early September.</i>			
ITOTS Data Entry Requirement Changes, and Required Communication with Physicians	Review revisions to Infant & Toddler Connection of Virginia Practice Manual and DMAS EI Services Manual	September 2011	System Managers	
	Revise local practices to meet the new ITOTS data entry requirements and the new requirements for communication with physicians	September 2011		
	Ensure that all practitioners in the local system are aware of the new requirements	September 2011		
Communication with Families	Identify whether there will be a change in the service coordinator starting October 1 for children who have Medicaid/FAMIS coverage	Early August 2011	Service Coordinators	
	Provide information to families about the EI TCM program using the appropriate "Fact Sheet" to guide the discussion and provide an opportunity for families to ask questions. <ul style="list-style-type: none"> • If the Service Coordinator will change on October 1, it is strongly recommended that this information be provided during a meeting with the family that includes the current Service Coordinator and the Service Coordinator who will be starting with the family on October 1. • If the Service Coordinator will change October 1 and the local system has more than one agency providing service coordination, the family must be given a choice of agencies. • A face to face meeting is recommended, though not required for families of children who will be keeping the same service coordinator. If a meeting is not held, then there needs to be a mechanism to provide ample opportunities for families to ask questions about the new TCM program and what it means for them. 	September 2011	Service Coordinator	
	Note: Clarification is being sought from DMAS about whether the Right to Appeal Process will be required for children whose Targeted Case Management Program will be changing (from ID or MH TCM to EI TCM).	September 2011	Service Coordinator	

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Documentation Requirements	<ul style="list-style-type: none"> ○ An IFSP review is not required for the implementation of EI TCM or for a change in Service Coordinators. ○ The current IFSP, even if it is the TCM version, can be continued until the next Annual IFSP ○ If the service coordinator agency is changing in a local system that will have more than one agency providing service coordination in October 2011, the parent must sign the IFSP ADDENDUM to acknowledge that they were given a choice of provider agencies. ○ The new service coordination short term goal can be added to the IFSP service coordination page the next time there is an IFSP review and/or a contact note can be used to document that the new short-term goal was discussed with the family in September or October and the new short term goal will be added to the IFSP at the next annual IFSP. 	NA	Service Coordinator	
First “Quarterly” Contact	The first “quarterly” contact must occur in October, November or December (or three months after the contact to explain the transition to EI TCM). Contacts are required every three months.	By December 31, 2011 at the latest	Service Coordinator	
First Communication with Physician re: Health Status Questions	The Health status questions must be sent to the physician at the time of the next IFSP review or Annual IFSP after October 1, 2011. It may make sense for local systems to send the questions to the physician 6 months after the most recent IFSP or at the next annual IFSP, whichever comes first.	See Specific Actions	Service Coordinator or designee	
Children Referred to the Local System July through September 2011	Provide information to the family about the change in Targeted Case Management that will occur in October and provide ample opportunities for questions and discussion. Initial information may be simply that there will be a change October 1. After the trainings and the availability of the Fact Sheets, more detailed information should be provided.	July through September	Service Coordinator	
	Continue procedures currently used (90 day TCM) <u>AND</u> if it is expected that the child may not have their IFSP until October 1 or later, explain and request parent signature on the Early Intervention Initial Service Coordination Plan (with a start date of October 1, 2011 listed on this plan). This will assure that there is a case management plan in place when the transition to EI TCM occurs on October 1, 2011.			