# TRANSFER TO NEW PROVIDER

IFSP and POC revisions

**MANAGER AND TEAM MEMBER ASSIGNMENT**

The manager will review the transferring case with the current exiting provider, and with their recommendation assigns the child to another team member based on best fit and current caseload.

# IFSP VISITS/PROCEDURAL SAFEGUARDS

The following are two options to complete the transfer, in order of preference, and with consideration for timelines of both providers and the family need:

**Whoever starts the IFSP must sign it.**

**Option 1.** After reviewing the case and securing a potential start date for the new PSP, the original PSP updates the IFSP
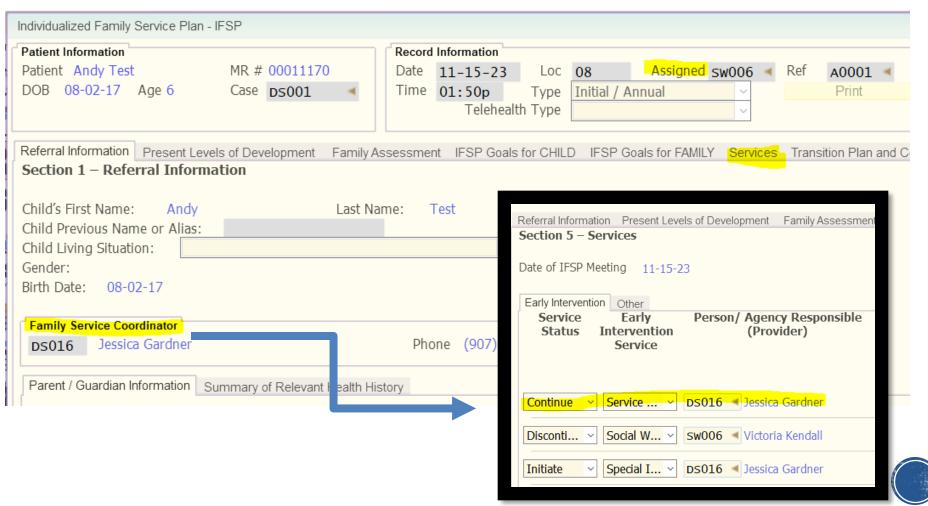
OR

**Option 2.** After reviewing the case with the original PSP, the new PSP updates the IFSP

# WHO SHOULD THE SERVICE COORDINATOR BE ON THE IFSP?

## Option 1.

After reviewing the case and securing a potential start date for the new PSP, <u>the Original PSP attends alone and updates the IFSP (as the "Assigned"),</u> and names the new staff as the Family Service Coordinator.
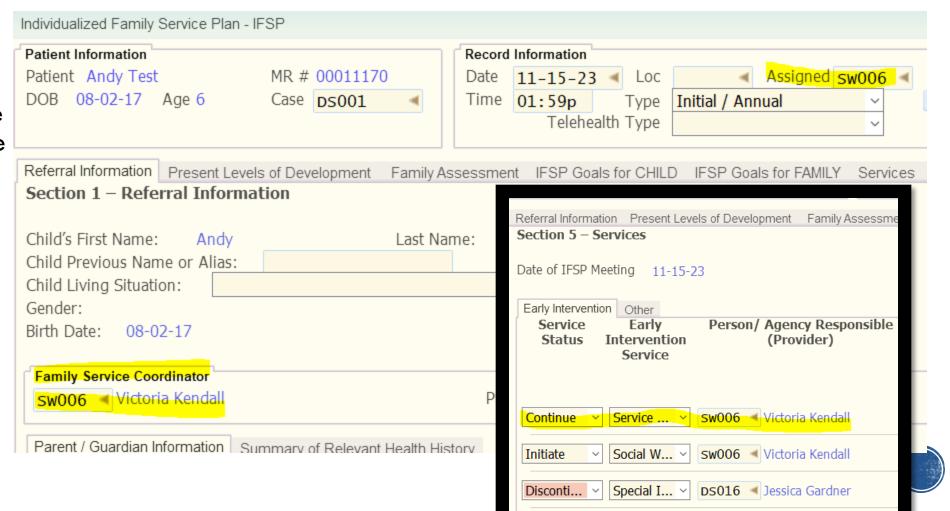
# HOW TO BILL IF 2 PROVIDERS ARE PRESENT:

- The IFSP signing provider uses those clocktimes
- The 2nd, non-signing provider, creates a daily note with FSC clocktimes

# WHO SHOULD THE SERVICE COORDINATOR BE ON THE IFSP?

**Option 2.**
After reviewing the case with the original PSP, the <u>new PSP</u> updates the IFSP. The **new PSP** completes the IFSP.

## INSTRUCTIONS FOR COMPLETING THE DOCUMENTATION

Services are added to the IFSP based on the child's need and the family's goals. Remember: the IFSP is **service** centered rather than specific provider centered. When discipline-specific services continue and providers change, there is no need to end a service and restart.

For example, if Dani Test DT is leaving and Nona Raintree, DT is taking over, indicate the service as continued and replace the name of the provider on the same line of the summary of services.

**DO NOT** discontinue and re-start the service *if* the service remains the same, only the provider is changing.

**FSC is always continued when transferred.**

Section 7 – Summary of Services

| Early Interventi Service | Person/ Agency Responsible (Provider) | Service Status | Start Date | Duration in months? (1,6,12) | Length (Total unit per contact) | Freq. | Intensity | Method (Provided by: ILP Provider or contractor, Needed unavailable | Locatio (Progra Setting: | Method of payment |
|---|---|---|---|---|---|---|---|---|---|---|
| Special... ∨ | Dani Test ‹ | Disco... ∨ | 07-07-22 ‹ | 6 | 1-4 | 6 - tw... ∨ | indiv | ILP | Ho... ∨ | Medicaid ∨ |
| Service... ∨ | Dani Test ‹ | Initiate ∨ | 07-07-22 ‹ | 6 | 1-4 | 3 - m... ∨ | indiv | ILP | Ho... ∨ | Medicaid ∨ |
| ∨ | ‹ | ∨ | ‹ | | | ∨ | | | ∨ | ∨ |

# INSTRUCTIONS: DISCONTINUED SERVICES

- Discontinue services when that service is no longer being provided to the child by *any* provider

## Section 7 – Summary of Services

| Early Interventi Service | Person/ Agency Responsible (Provider) | Service Status | Start Date | Duration in months? (1,6,12) | Length (Total unit per contact) | Freq. | Intensity | Method (Provided by: ILP Provider or contractor, Needed unavailable) | Locatio (Progra Setting: | Method of payment |
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| Special... ∨ | Dani Test < | Initiate ∨ | 07-07-22 < | 6 | 1-4 | 6 - tw... ∨ | indiv | ILP | Ho... ∨ | Medicaid ∨ |
| Service... ∨ | Dani Test < | Initiate ∨ | 07-07-22 < | 6 | 1-4 | 3 - m... ∨ | indiv | ILP | Ho... ∨ | Medicaid ∨ |
| ∨ | < | ∨ | < | | | ∨ | | | ∨ | ∨ |
| ∨ | < | ∨ | < | | | ∨ | | | ∨ | ∨ |

# INSTRUCTIONS: ADDING SERVICES

- When adding a service, be sure to list a start date that gives a reasonable amount of time to start services by.

- The service frequency listed is also the *minimum* that services will be provided, we can always do MORE!

- If the service added is: PT, ST, or OT, then a new CTB needs to be signed by the family

# INSTRUCTIONS: TRANSFER TO PROVIDERS OF <u>SAME</u> DISCIPLINE

Continue the relevant services → Do not change the start date! → Do not end and restart the service!

# INSTRUCTIONS: TRANSFER TO PROVIDERS OF SAME DISCIPLINE

**Before:**



**After:**

# INSTRUCTIONS: TRANSFER TO A NEW DISCIPLINE

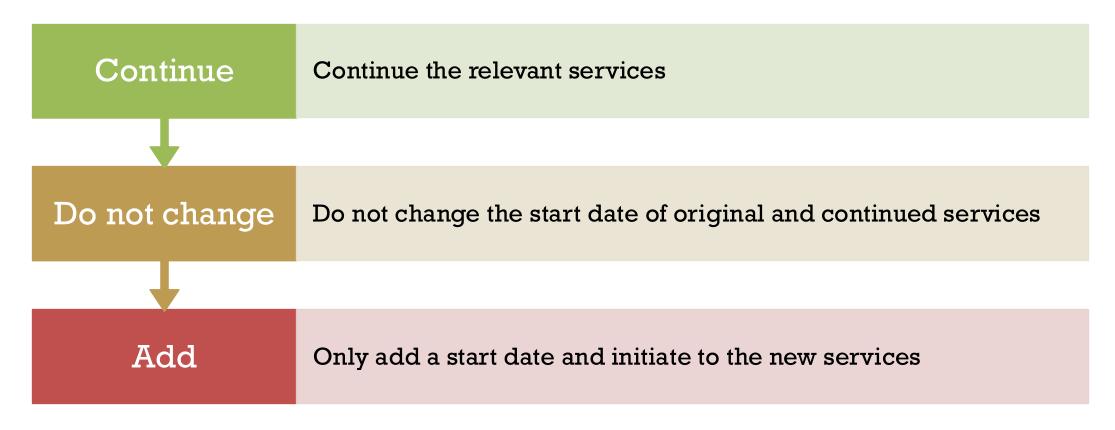| Continue | Continue the relevant services |
| --- | --- |
| **Do not change** | Do not change the start date of original and continued services |
| **Add** | Only add a start date and initiate to the new services |

# INSTRUCTIONS: TRANSFER TO A NEW DISCIPLINE

**Before:**

Section 7 – Summary of Services

| Early Interventi Service | Person/ Agency Responsible (Provider) | Service Status | Start Date | Duration in months? (1,6,12) | Length (Total unit per contact) | Freq. | Intensity | Method (Provided by: ILP Provider or contractor, Needed unavailable | Locatiol (Progra Setting: | Method of payment |
|---|---|---|---|---|---|---|---|---|---|---|
| Special... ⌄ | Dani Test | Initiate ⌄ | 07-07-22 | 6 | 1-4 | 6 - tw... ⌄ | indiv | ILP | Ho... ⌄ | Medicaid ⌄ |
| Service... ⌄ | Dani Test | Initiate ⌄ | 07-07-22 | 6 | 1-4 | 3 - m... ⌄ | indiv | ILP | Ho... ⌄ | Medicaid ⌄ |

**After:**

Section 7 – Summary of Services

| Early Interventi Service | Person/ Agency Responsible (Provider) | Service Status | Start Date | Duration in months? (1,6,12) | Length (Total unit per contact) | Freq. | Intensity | Method (Provided by: ILP Provider or contractor, Needed unavailable | Locatiol (Progra Setting: | Method of payment |
|---|---|---|---|---|---|---|---|---|---|---|
| Special... ⌄ | Dani Test | Disco... ⌄ | 07-07-22 | 6 | 1-4 | 6 - tw... ⌄ | indiv | ILP | Ho... ⌄ | Medicaid ⌄ |
| Service... ⌄ | Patty Therapist | Conti... ⌄ | 07-07-22 | 6 | 1-4 | 3 - m... ⌄ | indiv | ILP | Ho... ⌄ | Medicaid ⌄ |
| Physica... ⌄ | Patty Therapist | Initiate ⌄ | 09-01-22 | 6 | 1-4 | 12 - ... ⌄ | indiv | ILP | Ho... ⌄ | Medicaid ⌄ |
| ⌄ | | ⌄ | | | | ⌄ | | | ⌄ | ⌄ |

**CHANGING PRIMARY PROVIDER OF THE SAME DISCIPLINE ON POC**

1. Complete IFSP revision as described above

2. The new PSP does NOT update the POC until expiration

3. New primary provider assumes POC including goals and timelines

CHANGING SECONDARY PROVIDER OF THE SAME DISCIPLINE ON POC

1 Complete IFSP revision as described above

2 PSP updates the POC after the leaving/previous secondary provider's final visit

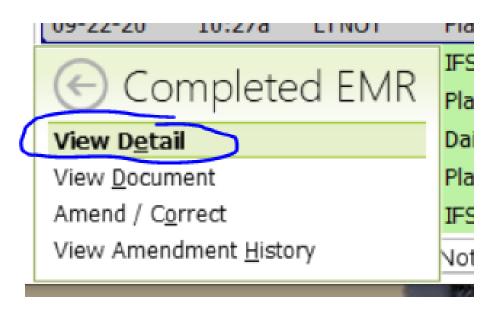3 New secondary provider assumes POC including goals and timelines

# How to Update POC: Secondary Providers of Same Discipline

- After the **leaving/previous** secondary provider's <u>final visit</u>, Primary Service Provider opens the POC

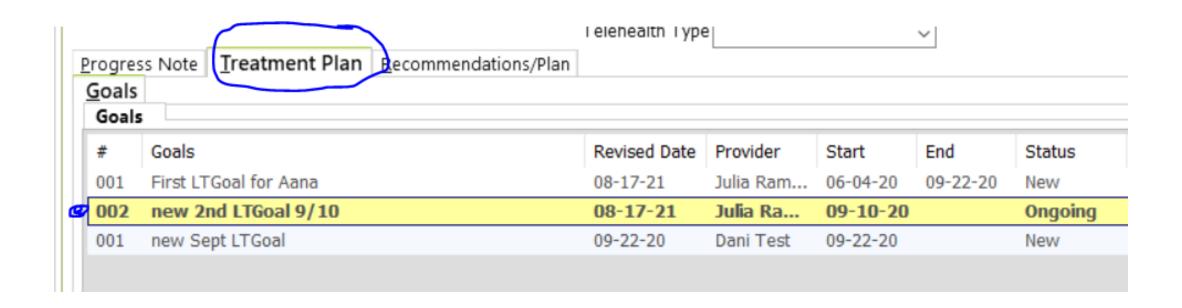| 10-13-20 | 07:57a | LTNOT | Intake Note | Physical Therapy | Jane Bulaong |
|----------|--------|-------|-------------|------------------|--------------|
| **09-22-20** | **10:27a** | **LTNOT** | **Plan of Care** | **Developmental...** | **Julia Ramirez** |
| 09-22-20 | 10:15a | IFR | IFSP Review | Developmental S... | Dani Test, DS Teste |

- Go to "View Detail"



# CHANGING SECONDARY PROVIDERS OF SAME DISCIPLINE ON POC

# CHANGING SECONDARY PROVIDERS OF SAME DISCIPLINE ON POC

- Go to Treatment Plan tab and click through each of the goals that have a secondary service provider

**1**

Who will be helping achieve this goal? (Therapists excluded)

**Therapists Using This Goal**

Therapist 1: 10004 < Julia Ramirez

Therapist 2: OT004 < Stephanie Voorhees

Therapist 3: <

Therapist 4: <

**2**

Who will be helping achieve this goal? (Therapists excluded)

**Therapists Using This Goal**

Therapist 1: 10004 < Julia Ramirez

Therapist 2: OT011 < Donna Kelley

Therapist 3: <

Therapist 4: <

# CHANGING SECONDARY PROVIDERS OF SAME DISCIPLINE ON POC

- Scroll to the bottom "**Therapists using this goal**" and change the leaving/previous secondary provider to the new one.

- In this example, Stephanie is the leaving/previous secondary provider and Donna is the new one:

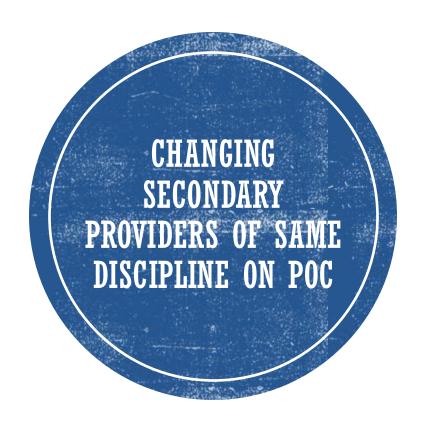## CHANGING SECONDARY PROVIDERS OF SAME DISCIPLINE ON POC

Save the document (F10);

Note: you will NOT be prompted to sign off for this edit.

The IFSP revision will prompt Admin to open a role record for the secondary provider to add the child to the secondary provider's caseload.

The secondary provider will need to be mindful of the POC timelines and update accordingly.

## CHANGING SECONDARY PROVIDERS OF SAME DISCIPLINE ON POC

- Lastly, there is **no need** to make an amended version that a physician/medical home needs to sign off, since the goals and the service type are remaining the same.

If the leaving provider is the primary service provider, an updated progress note is needed if the following criteria are met:

No visit is scheduled with the new PSP in attendance

OR

The child has previously been seen inconsistently with the leaving PSP

AND

There is no evaluation within the last 3 months.

# WHEN IS A PROGRESS NOTE NEEDED?