EXAMPLE PROVIDED BY: Bridges for Families Birth to 3 Program

INTAKE CHECKLIST

Contact the family within 48 hours (required by law), of the referral (if possible). If you are unable to reach the family by telephone within about a week send them a letter. If two attempts to reach the family fail, send a letter with the date after which you will no longer attempt to contact them.

Initial telephone call:

★ If the referral was made by someone other than the child's parents identify the referral source and ask if they are aware of the referral and our Birth to Three program.

★ Depending on the family's understanding of the program the following information may be shared:
- Explaining the Bridges program, process, possible costs and eligibility.
- Gathering more information about the family and child.

❑ Explain the purpose of the evaluation and schedule if needed. If evaluation(s) have been completed by another source have them reviewed by appropriate staff to decide if there is sufficient information to determine eligibility criteria.

❑ Put evaluation on the calendar and notify all staff via e-mail, include the evaluation date and time, evaluators (put date, time and evaluators in subject of e-mail), child's name, dob, parents, address where evaluation will be, telephone number, insurance, concerns about the child's development and interpreter if needed.

❑ Schedule intake visit (May do telephone intake if appropriate. Remember to get forms signed) in enough time before the evaluation so you can give the evaluation team background information before they evaluate the child.

At the initial visit:

❑ Explain the Bridges program, parent and child rights, Parental Cost Share, and evaluation process (this may be done by going over the contents of the Welcome Packet).

❑ Get necessary forms signed.(consent to evaluate, HIPPA, and any needed release of information forms, especially the primary physician). Leave the carbon copies with the family.

❑ Explore family's concerns regarding their child.

❑ Gather developmental information using the Developmental History form as a guide.

★ If appropriate, an evaluator could be present at this visit to conduct a developmental screening. This decision would be made ahead of time but SC, after talking to the family, can change this decision.

★ Besides giving the family the resource guide in the Welcome Packet further explanation of specific community resources might be discussed and given at this time based on the family's situation.

❑ Answer any family questions.

After the initial visit:

❑ Email office staff child demographics gathered at the initial visit

❑ Fill in the child demographics, the reason for referral and background information. Remember to fill in the page headers and signature line of service coordinator (name and telephone number).

❑ Share the information regarding the child's development with the evaluation team. This background information may be given verbally, by e-mail, putting the information in the areas on the Developmental Report, or getting the Developmental History written information to the evaluation team. (Be sure the evaluation team knows how to access this information.)

★ Send out completed Information Release Authorization forms requesting outside information about the child if needed.

★ Reconfirm the evaluation with the family a few days to a week beforehand, if necessary or requested by the family.

✓ After team meeting where evaluation has been discussed and possible EI dates, service coordinator will contact the family to schedule EI meeting.