

1<sup>st</sup> Kids

Technical Proposal

Appendix B

Region A, B, C and D

Initial Provider Request Procedure

### Initial Provider Requests

#### \*Changes/Additions to Existing Processes:

- In Teamwork, AA Template will categorize newly created projects as “Cluster \_\_\_\_: Referrals”. If a child was re-referred, the child will be set as active, then the category will be changed to “Cluster \_\_\_\_: Referrals”.
- At intake appointments, SC will now have parents complete the “Agency Selection” form. Families will choose their first choice agency and mark all agencies they are willing to share information with for the purpose of obtaining appropriate providers. The form must be signed acknowledging their selections.

#### To make a request:

- SC will select the child’s project and go to “People”. SC will then assign the agency admin for the 1<sup>st</sup> choice agency selected by the parents on the “Agency Selection” form.
- Under Messages, SC will create a message notifying the 1<sup>st</sup> choice agency as follows:
  - In the Subject: **Initial Provider Request: (1<sup>st</sup> Choice Agency)**
  - In the Message include:
    - Date of Request
    - Initial IFSP Date
    - Town (Note if services would take place in a different town)
    - Disciplines needed
    - Include any additional notes such as twin/sibling/medical/areas of concern
  - Notify 1<sup>st</sup> Choice agency
  - Categorize as “Request for Providers”

#### Responding to a request:

- The agency admin will receive an email notification when a message is posted. All requests will be labeled “Initial Provider Request”. The primary agency will be listed behind the Initial Provider Request to show whether or not it is a released request or your agency’s responsibility. Agency Admin may respond to the request via email to offer providers and include any notes.
- If no providers are available, the 1<sup>st</sup> choice agency will release the child to the other agencies by going to “People” then adding the Agency Admin for all agencies listed on the Agency Selection form. Return to Messages. Type “Released” under the Initial Provider Request thread, select all unchecked Agency Admins listed under “who to notify”, then post. This will send a request to remaining agencies.
- Agencies may choose to re-categorize children to assist in tracking offers by clicking the pencil next to the child’s name, then select the “Advanced” tab. Choose the appropriate category (be sure to choose the category under the correct cluster) then click “Update”.
- When logged in, agencies can review all children under “Projects”. Children will be divided by category on the left side of the screen. Agency Admin may use the option to star projects to assist in sorting projects.
- Once an IFSP is written, the project may be re-categorized as “Cluster \_\_\_\_: Ongoing” by the agency. This will differentiate the children in intake from ongoing children under the “Projects” view for the agencies.

Once an agency is selected:

- Once the Initial IFSP is written, the coordinator will go reply to the Initial Provider Request notifying all agencies that offered providers who was selected. The coordinator will then go to “People” under the child’s tab and remove all agency admins that were not selected for the plan and add all providers added to the plan.
- If no services were added, the coordinator will reply to the Initial Provider Request thread stating that no IFSP was written.