Revision to documenting Btots Beginning July 2020

We want interdisciplinary teams communicating with families and providing best practice. We don’t want the visit documentation to get in the way of the great service you provide. We will continue to educate our state agency on the use of practice and best way to document services. We will do our best to minimize impact of funding formula on service.

**Consultation** – not enter consultation as visit (How document those took place? Paper visit note in file?)

If assessment occurring to prepare for initial, periodic or annual IFSP or for internal referral to add service, DO NOT mark as consultation. You really are assessing to determine if services need to be added to IFSP. Consultation visits are counted in total visits and total count state pays for. Can’t bill Medicaid or chip.

*Initial IFSP Process*

**Other Eligibility Determination** SC – FDA/ASQ

**Initial IFSP developmen**t: This is the initial IFSP meeting and requires SC and 1 other. SC may also discuss transition here. So SC marks IFSP development. Show one other team member as completing Initial IFSP development. All other attendees would be in the internal notes.

SC only identify themselves one, NOT as IFSP development AND SC.

Continue to have whole team attend. State will count all these people are 3 or 4 visits if each is marked as attending.

**IFSP development** – This should be marked when completing amendments. (adding, changing, or removing services). 1 person is listed. Additional person will be listed in Internal notes)

If service is provided in conjunction of IFSP meeting (either initial, annual or periodic), complete 2 visit notes – one for the IFSP and one for the visit.

When Amendments are done, sometimes SC are not completing visit notes for this amendment. When they do this with provider, SC complete visit note and list provider in internal notes. But if provider gives strategy, the provider does a visit note and sc listed on internal notes.

*Annual IFSP Process*

**Ongoing Assessment**: If two people go and do the same assessment, show one person completing Initial Eligibility Determination as primary assessor and the second person in the internal notes. If multiple people evaluating at the same time on separate assessments, they need to show each evaluator as initial eligibility determination so the associated visit will be there.

\*Remember when there’s no service provided, but two people are completing the same assessment together mark one as initial eligibility determination (or ongoing if not the first ones to assess) and note the other person in the internal notes.

SC - FDA/ASQ is listed as ongoing assessment. Do not mark SC and ongoing assessment.

If completing assessment and therapy, still mark both boxes and get counted twice. OR complete two visit notes. Either way it is counted as two visits and that is fine when you compete assessment and therapy at the same visit.

**Periodic Review** – Only a service coordinator is required for this meeting. (We used to call it a 6-month meeting). So just show the SC as periodic review. Additional team members are listed in internal notes. Do NOT mark SC as doing IFSP development AND SC.

Still best practice to have full team at periodic review. SC can hold it alone to keep timely, but otherwise we would like everyone there.

**Annual IFSP Development** – This is the annual IFSP meeting and requires SC and 1 other. Show SC as completing SC and other staff as completing Initial IFSP development. All other attendees would be in the internal notes. Do not mark Service coordination AND IFSP development for SC.

**Transition Discussion:** Opt Out and Transition Plan discussions should be documented in the btots page notes. NO visit note needs to be completed.

**Transition Conference:** Just Service Coordination should be marked. Do NOT mark Transition AND SC. Just service coordination. BTOTS requires it to be service coordination. It is NOT two meetings or two purposes. So just do one visit note with SC marked. Transition is an option when transition meeting is held after eligibility but before IFSP development and SC is NOT marked.

IF completing Transition Discussion (as documented in transition tab) and assessment at same visit, just mark one visit and mark as ongoing assessment.