**Up-to-3 Referral Script**

Introduction:

* Parent calling in to refer their child

“Up-to-3 Early Intervention this is \_\_\_\_”

* + Parent explains that want to get their child evaluated by Up to 3.

“So, if I understand you correctly, you are wanting to get your child referred to our program to get him/her evaluated? Yeah, I can definitely help you out with that. How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just gives us a general idea of where he/she is at in their development so we can be more prepared for the evaluations. The referral process takes about 15-20 minutes over the phone, is now a good time to do this?”

* Transfer from Miriam (who already explained the process)
  + “Up-to-3 Early Intervention this is \_\_\_\_ I understand you are wanting to refer your child?”
    - Start referral process
* Calling back parents who left message wanting to refer their child
  + “Hey this is \_\_\_ from Up-to-3 Early Intervention. Am I speaking to\_\_\_\_? Great! I am just giving you a call back because I see that you left a message wanting to refer your child to our program, is that correct? Awesome!
  + “How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just gives us a general idea of where he/she is at in their development so we can be more prepared for the evaluations. The referral process takes about 15-20 minutes over the phone, is now a good time to do this?”
* Calling a parent who has been referred to us by DCFS
  + “Hey this is \_\_\_ from Up-to-3 Early Intervention. Am I speaking to\_\_\_\_? Great! I am giving you a call because our program received a referral from DCFS (Division of Child and Family Services) for \_\_\_\_\_. The reason that DCFS will send our program referrals like this is because our program works with kids with developmental delays or disabilities of various kinds. We provide services like speech therapy, physical therapy, occupational therapy etc. among other services to help out with various needs and we are wondering if you would be interested in having us evaluate your child? All of our evaluations are completely free so it’s a great resource for you if you have any concerns for your child or just want to see where they are at in their development”
  + If parents are interested:
    - “How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just lets us know where he/she is at so we can be more prepared for the evaluations. The referral process takes about 15-20 minutes over the phone, is now a good time to do this?”
  + If parents are NOT interested
    - “Our program helps kids up to the age of three, so if you have any concerns about your child’s development before they turn 3 then our program would be a great resource for you in the future. Let me go ahead and give you our number in case you have any future concern.”
      * Give parent our number
* Calling a parent who has been referred to us by a hospital
  + “Hey this is \_\_\_ from Up-to-3 Early Intervention. Am I speaking to\_\_\_\_? Great! I am giving you a call because our program received a referral from \_\_\_\_\_ hospital for \_\_\_\_\_\_. The reason that hospitals will send our program referrals like this is because our program works with kids with developmental delays or disabilities of various kinds. We provide services like speech therapy, physical therapy, occupational therapy etc. among other services to help out with various needs and we are wondering if you would be interested in having us evaluate your child?All of our evaluations are completely free so it’s a great resource for you if you have any concerns for your child or just want to see where they are at in their development”
  + If parents are interested
    - “How the referral process works is I would need to gather some information from you (i.e. contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just gives us a general idea of where he/she is at in their development so we can be more prepared for the evaluations. The referral process takes about 15-20 minutes over the phone, is now a good time to do this?”
  + If parents are NOT interested
    - “Our program helps kids up to the age of three, so if you have any concerns about your child’s development before they turn then our program would be a great resource for you in the future. Let me go ahead and give you our number in case you have any future concern.”
      * Give parent our number
* Calling a parent who has been referred to us by a doctor’s office
  + “Hey this is \_\_\_ from Up-to-3 Early Intervention. Am I speaking to\_\_\_\_? Great! I am giving you a call because our program received a referral from doctor \_\_\_\_ office. The reason that doctor’s offices will send our program referrals like this is because our program works with kids with developmental delays or disabilities of various kinds. We provide services like speech therapy, physical therapy, occupational therapy etc. among other services to help out with various needs and we are wondering if you would be interested in having us evaluate your child? All of our evaluations are completely free so it’s a great resource for you if you have any concerns for your child or just want to see where they are at in their development”
  + If parents are interested
    - “How the referral process works is I would need to gather some information from you (i.e contact information, concerns etc.) and then fill out a questionnaire with you over the phone. This questionnaire is about the overall development of your child and just gives us a general idea of where he/she is at in their development so we can be more prepared for the evaluations. The referral process takes about 15-20 minutes over the phone, is now a good time to do this?”
  + If parents are NOT interested
    - “Our program helps kids up to the age of three, so if you have any concerns about your child’s development before they turn then our program would be a great resource for you in the future. Let me go ahead and give you our number in case you have any future concern.”
      * Give parent our number
* Scenario if the child being referred is less than 45 days from turning 3 years old
  + “So, our program only works with children who are under the age of 3. After they turn 3, they are referred to the school district who will then help them from there. We need at least 45 days before they turn 3 to complete all our evaluations. If you tell me what school district you’re in, I can give you the contact information for the school district representative who is in charge referring your child to their programs.
  + \*\*Contact information for school district representatives are on the back of our directory sheet\*\*
* Scenario if the child is still within the 45-day limit but still close to turning 3
  + “So, our program only works with children who are under the age of 3. After they turn 3, they are referred to the school district who will then help them from there. We can still evaluate your child but may not have much time afterwards to provide our services before they are referred to the school district who do their own testing. If you would like, we can still do all our testing and then help you get your child referred to the school district later when they turn 3. Or if you know which school district you’re in, I can give you the contact information for the representative who can help you get your child directly referred to them?”
  + \*\*If the parent still wants them referred to our program, proceed with the referral\*\*
    - Note: we are not trying to discourage anyone from referring their children to our program. If a parent has a child who has at least 45 days until they turn three we can and should still evaluate them and provide any services we can until they turn three years old. In this scenario we are only advising the parent so that they are aware of the time frame their child would be in our program. If parents are still interested in referring their child, please be just as courteous to the family as you would any other family.
  + \*\*If they want to refer directly to the school district, provide the contact information for school district representative\*\*
* Scenario if the parent is interested in getting their child referred but they do not have time to complete the referral process over the phone
  + Scheduling a specific time
    - “No problem! Is there a better time I could call back that would work better for you?”
    - Parents gives you a specific time
    - “Great! I will give you a call then. Also, just in general when are you typically most available for us to contact you?”
      * Make a note of the schedule time with parents and when they are generally most available (use these times if the parent doesn’t answer the scheduled time)
  + Getting a general sense of parent’s schedule
    - “No problem! When are you typically most available for us to give you a call back?”
    - Parents gives you general times
    - “Great! We will try contacting you again during these times. Additionally, our office is open from 9-5 so you can give us a call anytime in this time frame to complete the referral”

The Referral Process:

* “What is your child’s name? How do you spell that? “\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat name and spelling back to parent for verification
* \**if you aren’t sure if it’s a boy or a girl\** “Is this your son or daughter?” \_\_\_\_\_\_\_\_\_\_\_\_
* “What is your child’s birthdate?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat birthdate back to parent for verification
* “Were they born premature? If so, by how many weeks?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Note: Prematurity is defined by BTOTS as four or more weeks early
* “What is your name (mom or dad’s name)? How do you spell that?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat name and spelling back to parent for verification
* “What is your address? Is there an apartment number with this address?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ apt # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat address back to parent for verification
* “Is your physical address the same as your mailing address?” (if different list mailing address)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* + Repeat address back to parent for verification
* “What is the best number to reach you at?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat number back to them
* “Is there a good email address we can list for you? How do you spell that?”

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* + Repeat email address back to parent
* “Are you okay receiving text messages and emails?”
  + Indicate parent preference
* “Do you want to list the other parent as a contact as well? If so, what is their name and number?” Name and number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat name and phone number back to parent for verification
* “How did you hear about our program?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* “Who is your child’s primary care physician or pediatrician?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* “Does your child have Medicaid or CHIP?” #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + If yes
    - “I can either get that number from you now, or you can give it to us later on in the evaluation process?”
    - If they choose to give it to you during the referral, repeat it back to them for verification
* “What is the primary language spoken in the home?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* “Are there any secondary languages spoke in the home as well?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \*\*If the primary language is NOT English\*\* “What language would you like the evaluations done in?” OR “Would you like us to find an interpreter for the evaluations?”
  + Preferred Evaluation Language:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* “What is your child’s race and ethnicity?”
  + Circle one
    - Two or more races
    - American Indian or Alaska Native
    - Asian
    - Black or African American
    - Native Hawaiian or Other Pacific Islander
    - White
  + If parent just says “white” or another race, please ask them “Is your child’s ethnicity Hispanic or Non-Hispanic?”
    - Hispanic/Latino
    - Not Hispanic/Latino
* “What are your concerns about your child’s development?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Repeat concerns back to parent afterwards
* “Are there any more concerns about your child’s development?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* “Generally, when are the best time to contact you?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

“Generally, when are you most available to do visits and evaluations?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
“Are there times like nap times, or any other times that we would want to avoid?” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ASQ

* “The last part of the referral process is to fill out the questionnaire. Would you give me second while I go get that, so we can finish up with that?”
* Grab the appropriate ASQ/ASQSE based on their adjusted age
  + Use an age calculator: <http://www-users.med.cornell.edu/~spon/picu/calc/agecalc.htm> OR
  + Use the ASQ website’s calculator: <https://agesandstages.com/free-resources/asq-calculator/>
  + If the child is premature use the adjusted age when completing the ASQ. If the child is one month early use the ASQ from a month earlier. If the child is two months early use the ASQ from two months earlier.
* “On this questionnaire the answers are yes, sometimes, or not yet so just answer to the best of your abilities on each one.”

\*\* Fill out ASQ\*\*\*

* “Have you or anyone who knows your child been concerned about Autism?” \_\_\_\_\_\_\_\_
* “Does either parent have a family history of Autism?” \_\_\_\_\_\_\_\_\_\_
* If parent answered “yes” to either of the last two questions ask:
  + “Has your doctor ever been concerned about Autism?” \_\_\_\_\_\_\_\_\_\_
  + “Did your doctor do a screening assessment or screen for Autism?” \_\_\_\_\_\_\_\_\_
* If the parent answered “yes” to one or all of the previous four questions about ASD, you must fill out an ASQSE in addition to the ASQ unless the parent declines.
* If an ASQ-SE needs to be filled out as well:
  + “There is another questionnaire that deals more with behavior that we would want to fill out as well since there are concerns in those areas. Is it alright if we fill that out as well over the phone? On this questionnaire the answers are most of the time, sometimes, or rarely or never. Additionally, if you are specifically concerned with a behavior listed in the question please let me know as well.”

\*\* Fill out ASQ-SE\*\*\*

Referral Conclusion and Scheduling a BDI

* **Covid-19/New Normal Circumstances**
  + “That should be all the information that we need to get your child referred. Let me explain how the rest of the process works. There is typically a nurse who will conduct a health evaluation on your child. There is also an evaluation where they will test all areas of development that are relevant for your child’s age. If they need to do any more specific testing, such a speech or gross motor evaluations we will conduct those addition to the overall evaluation. I will get all this information to one of our service coordinators. Our service coordinators are essentially case managers for the process. They are the ones who will facilitate the rest of the process for you and coordinate with all the therapists who will need to participate in the evaluation process. They will also be your main point of contact moving forward.
  + If the referral is done on Monday before the weekly referral cut-off (service coordinators stop accepting new referrals for the current week on Monday night):
    - “Our service coordinators typically review new referrals on Tuesdays and contact families by the following Friday. In this case you will hear from your service coordinator by this upcoming Friday. If you don’t hear from anyone by this Friday, please give us a call back to follow up with us”. OR
  + If the referral is done on Tuesday through Friday after the weekly referral cut-off:
    - “Our service coordinators typically review new referrals on Tuesdays and contact families by the following Friday. In this case you will hear from your service coordinator by next Friday (give date) at the latest. If you don’t hear from anyone by next Friday, please give us a call back to follow up with us”.
  + Virtual vs In-Person Format (depends on current Covid-19 situation)
    - Hybrid Model (current course)
      * If the child is under 12 months
        + “The overall developmental evaluation, which is called the Battelle Developmental Inventory or BDI, will be conducted virtually through Zoom. We are trying to move more to in-person visits but with Covid-19 it can be a constantly changing situation. Your service coordinator will explain how the other evaluations will be conducted but there will probably be a mix of in-person evaluations and services.”
      * If the child is over 12 months
        + “The overall developmental evaluation, which is called the Battelle Developmental Inventory or BDI, will be conducted in-person at our office in either Logan, Tremonton, or Brigham. We are trying to move more to in-person visits but with Covid-19 it can be a constantly changing situation. Your service coordinator will explain how the other evaluations will be conducted but there will probably be a mix of in-person evaluations and services.”
    - Mostly Virtual
      * If the child is under 12 months
        + “Right now, all of our evaluations are being conducted virtually through Zoom”
      * If the child is over 12 months
        + “The overall developmental evaluation, which is called the Battelle Developmental Inventory or BDI, will be conducted in-person at our office in either Logan, Tremonton, or Brigham. The rest of the evaluations will be conducted virtually and your service coordinator will give you a little more information about this.”
  + BDI Scheduling:
    - For children over 12 months of age
      * “I will go ahead and schedule the overall evaluation, or BDI evaluation, with you here over the phone. Your service coordinator will schedule any additional evaluations that they may need to conduct when they contact you. This evaluation is typically done at our center in \_\_\_\_\_\_\_ (Brigham City, Tremonton, Logan etc). Typically, we want to schedule a two-hour block to complete the evaluation. Although the BDI evaluation usually takes a little less time, we like to schedule two hours because it can take longer based on somethings such as how cooperative your child is. Let me go ahead and pull up the schedule and see when the next available appointment is.”
      * Search the SC map to determine who their service coordinator and BDI evaluator is based on family’s address. The hierarchy of scheduling is also listed below
        + Kathryn/Heather: Lisa (primary evaluator) 🡪 Mary 🡪 If there are still no openings within 4 weeks, hold off on scheduling and talk to Marla. Let family know that they will be contacted at a later date for scheduling.
        + London/Ashlyn/Lindsey: Mary (primary evaluator) 🡪 Kevin 🡪 Emma 🡪 Lisa 🡪 If there are still no openings within 4 weeks, hold off on scheduling and talk to Marla
        + Jamie: Emma (primary evaluator) 🡪 Kevin 🡪 Mary 🡪 If there are still no openings within 4 weeks, hold off on scheduling and talk to Marla. Let family know that they will be contacted at a later date for scheduling.
        + Jacque: Kevin (primary evaluator) 🡪 Emma 🡪 Mary 🡪 If there are still no openings within 4 weeks, hold off on scheduling and talk to Marla. Let family know that they will be contacted at a later date for scheduling.
        + Schedule ALL Spanish BDI appointments, regardless of age and area, with Spanish BDI evaluator (currently Mary Hammond)
      * “You mentioned that you were most available\_\_\_\_\_\_\_\_ (reference times collected previously in the referral) correct?
      * “We typically schedule a two-hour block for our BDI appointments. It usually takes a little less than that but it could take longer based on how cooperative your child is, so we like to schedule the full two hours just to be safe.”
      * “Okay I have availability on \_\_\_\_\_\_\_\_\_\_\_ (date) from \_\_\_\_\_\_\_\_\_ (Specific time available) does this work for you? OR “I have availability any time after \_\_\_\_\_\_\_\_ (time) on \_\_\_\_\_\_\_\_ (date) does that work for?”
      * If time doesn’t work, find another time and repeat
      * “Great! I’ll go ahead and schedule you for \_\_\_\_\_(date) at \_\_\_\_(time). Your evaluator will be \_\_\_\_\_\_ (BDI Evaluator). Let me go ahead and give you their number. If anything comes up and you need to reschedule this appointment, please contact the evaluator.”
      * Information about Logan location:
        + “This evaluation will be held at our center on Utah State University’s campus. We are located on the south side (or campus side) of Logan cemetery. The building is called the Sorenson Legacy Foundation Center for Clinical Excellence. It’s a red brick building. The address is 6405 Old Main Hill, Logan, UT 84321.”
        + “I will be emailing you a packet with directions to our center, a parking pass, a consent form, and a document outlining our Covid-19 procedures. We also ask that only one parent and your child come to the center on the day of the evaluation.”
      * Information about Brigham City location
        + “This evaluation will be held at our office in Brigham City. Our address is 10 S 400 E Brigham City, UT 84302.”
        + “I will be emailing you a packet with directions to our center, a consent form, and a document outlining our Covid-19 procedures. You will not need a parking pass to park at our office. We also ask that only one parent and your child come to the center on the day of the evaluation.”
      * Information about Tremonton location
        + “This evaluation will be held at our office in Tremonton. Our address is 420 W 600 N Tremonton, UT 84337”.
        + “I will be emailing you a packet with directions to our center, a consent form, and a document outlining our Covid-19 procedures. You will not need a parking pass to park at our office. We also ask that only one parent and your child come to the center on the day of the evaluation.”
      * If parents have concerns with doing this evaluation in-person (since this evaluation is typically done in-person)
        + Schedule the evaluation as normal and explain:
        + “I will reach out to the BDI evaluator and let them know you have concerns about doing this evaluation in-person. They will contact you to address any concerns you have and to coordinator an alternative method of delivery.”
    - For children under 12 months of age (English BDI evaluations are always scheduled with Molly)
      * “I will go ahead and schedule the overall evaluation, or BDI evaluation, with you here over the phone. This evaluation will be conducted virtually through Zoom. This evaluation usually takes about an hour to complete. Your service coordinator will schedule any additional evaluations that they may need to conduct when they contact you. Let me go ahead and pull up the schedule and see when the next available appointment is.”
      * “You mentioned that you were most available\_\_\_\_\_\_\_\_ (reference times collected previously in the referral) correct?
      * “These appointments typically take about an hour to complete.”
      * “Okay I have availability on \_\_\_\_\_\_\_\_\_\_\_ (date) from \_\_\_\_\_\_\_\_\_ (Specific time available) does this work for you? OR “I have availability any time after \_\_\_\_\_\_\_\_ (time) on \_\_\_\_\_\_\_\_ (date) does that work for?”
      * If time doesn’t work, find another time and repeat
      * “Great! I’ll go ahead and schedule you for \_\_\_\_\_(date) at \_\_\_\_(time). Your evaluator will be \_\_\_\_\_\_ (BDI Evaluator). Let me go ahead and give you their number. If anything comes up and you need to reschedule this appointment, please contact the evaluator. The evaluator will also be emailing you the week of the evaluation with the Zoom link.”
      * If parents have concerns about doing this evaluation virtually (since we typically do every BDI under 12 months virtually).
        + Schedule the evaluation as normal and explain:
        + “If you have concerns about doing this evaluation virtually, I will contact your evaluator and have them reach out to you. The evaluator will be able to work coordinator any alternative delivery methods for this evaluation. They can also further explain the virtual evaluation process and answer any questions you have with more details.”
  + “Your service coordinator will schedule any additional evaluations when they contact you. After they have finished doing all the evaluations, your service coordinator will review all of the results with you. If your child is eligible for our program and you are interested in our services, they will create an individualized service plan for your child.”
  + “All of our evaluations are free. If your child is eligible for our program, and you are interested in our services, then there is typically a monthly cost associated with our program but this is a based-on family income and family size. We us a sliding fee chart to determine this. If your child has Medicaid or CHIP these actually cover the entire cost of our services. Your service coordinator will review this information with you when they contact you.”
  + Virtual Consent
    - “As I stated previously, we are providing some virtual services. In order to provide virtual services, we will need your permission or consent so there are few things I need to read you regarding this.”
      * Proceed to read/complete the document below
      * After obtaining virtual consent, this must be documented in the “Referral Notes” section. Likewise, if parents decline virtual visits this will need to be documented as well.
    - If parents decline virtual visits:
      * “We will not deny anyone services based on this, so I will make a note to your service coordinator who will discuss different in-person options when they contact you.”
  + Parent concerns and how to address them
    - Parent has concerns with virtual visits
      * Reassuring parents
        + “We have found that virtual visits are still effective in providing outstanding support to children with developmental delays or disabilities. We have also gained a lot of valuable experience during the past year and half. I will make a note of your concerns with virtual visits with your service coordinator. When they contact you, please feel free to discuss any of these concerns with them. We try to be as flexible as possible when it comes to working with parents, so they will work out the format of our services with you.”

Make a note in the referral notes about parent concerns with virtual visits and ask providers to give the parent more information about virtual services when they contact them.

* + - Parents who have concerns with in-person visits
      * “We have found that virtual visits and evaluations are still very effective at helping kids in our program. If you would prefer that our evaluations be conducted virtually, I will make a note of that for your service coordinators. Please feel free to discuss these concerns with them and they will coordinate the method of delivery with you. “
    - How long the SC will take to contact them
      * “I will make a note for your service coordinator that you are wanting to get your child evaluated as soon as possible. I will also reach out to your service coordinator about your concerns. I can’t guarantee that they will be able to contact you before next Friday but I will reach out to them about your concerns.”
    - Concerns about family fee/wants more information about what the actual cost could be
      * If the child has Medicaid/CHIP:
        + “All of our evaluations are completely free so you don’t have to worry about the cost of the evaluations. Afterward there is typically a month cost associated with our program. However, Medicaid/CHIP insurance cover the entire cost of our services so you would not have to worry about the cost”
      * If the child does not have Medicaid/CHIP:
        + “All of our evaluations are completely free so you don’t have to worry about the cost of the evaluations. Afterward there is typically a month cost associated with our program. The monthly cost depends on family income and family size. We use a sliding fee chart to determine the monthly fee. However, I do want to let you know that we like to keep in mind everyone’s unique circumstances and try to be as flexible as possible with this monthly fee. I will make a note about your concerns with the fee to your service coordinator who will contact you to address them.”
        + If the family wants to know what the fee actually is, read some of the sliding fee chart options to them (found on BTOTS under Blank Forms)

“How many people are in your family?”

“Based on your family size, if you make \_\_\_\_\_\_ to \_\_\_\_\_ a year it would be \_\_\_\_. If you make \_\_\_\_\_\_ to \_\_\_\_\_ a year it would be \_\_\_\_. If you make \_\_\_\_\_\_ to \_\_\_\_\_ a year it would be \_\_\_\_. If you make \_\_\_\_\_\_ to \_\_\_\_\_ a year it would be \_\_\_\_. If you make \_\_\_\_\_\_ to \_\_\_\_\_ a year it would be \_\_\_\_.

**Parent Agreement: Virtual Visit**

Child Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Child BTOTS ID:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_

Intake staff:\_\_\_\_\_\_\_\_\_\_\_\_

Intake office staff directions: Document parent decision to do VHV or does not as the **FIRST sentence** in the BTOTS referral tab, Referral Notes section. Add a new alert, if Parent **does not** agree to VHV. SC can remove this alert when the child exits.

Read the following

1. Up to 3 is primarily providing services using zoom, a video conferencing system, due to COVID-19 health restrictions. We call these visits - Virtual Home Visits.
2. Up to 3 uses a professional version of Zoom and implements all suggestions to ensure the security of visits.
3. Up to 3 will not record any Virtual Home Visits without obtaining additional consent from you.
4. Ask: “*Do you have* **☐** *or Do you NOT have* **☐***a computer, tablet, or smart phone and internet that will allow you to participate in a virtual visit*?”
   1. (read only if the parent “**does not have**”)

“*Because you stated that you do not have access, I will inform your service coordinator. We will determine a reasonable way to provide evaluation, IFSP and services duringCOVID-19 restrictions”*.

1. The cost for the family’s computer, tablet, smart phone and internet are the responsibility of the family.
2. All visit notes and other documents can be accessed through the BTOTS Parent Portal at your convenience. The Service coordinator will explain to you how to access them.
3. Do you accept or decline the offer of Up to 3 providing services to you and your child using Virtual Visits? Accept **☐**Decline **☐**

If they decline, continue with intake and let family know that you will have their service coordinator contact them to determine how evaluation and services will be provided during the period of COVID-19 restrictions.

1. Did the family have any questions? Yes **☐** No **☐**

Write (below) any questions that parent asked and your response. When the Up to 3 intake staff are unable to provide an adequate response to a parent’s question an Up to 3 program administrator will call the family within 1 working day.

Put paper copy with other documents to be maintained in the child’s paper chart.

Parent Agreement for Virtual Visits 1/11/2020

* After obtaining virtual consent, ask if they have any more questions and end the call