

Document Reference Guide

Year: _____

Document	Initial Date	Update Due	Update Date
To complete a referral:			
Referral		N/A	N/A
Consent for Release & Exchange of Information		Every January & July, regardless of referral date	<input type="checkbox"/> July <input type="checkbox"/> Jan
To complete enrollment:			
Receipt of Dispute Resolution Process		N/A	N/A
Strengths & Needs Assessment		Quarter 1	
		Quarter 2	
		Quarter 3	
		Quarter 4	
Crisis Plan		Annually	
Safety Plan, as needed		Annually	
Plan of Care (or Early Intervention IFSP or DODD ISP)		Annually, every July, at minimum	
Ongoing:			
Case Update*	N/A	10 days prior to Service Coordination Committee meeting	<input type="checkbox"/> July <input type="checkbox"/> Jan <input type="checkbox"/> Aug <input type="checkbox"/> Feb <input type="checkbox"/> Sept <input type="checkbox"/> Mar <input type="checkbox"/> Oct <input type="checkbox"/> Apr <input type="checkbox"/> Nov <input type="checkbox"/> May <input type="checkbox"/> Dec <input type="checkbox"/> June
Funding Request**	N/A	10 days prior to Service Coordination Committee meeting, as needed (earlier if urgent)	
To complete at discharge:			
Plan of Care Transition & Discharge	At discharge	N/A	N/A
Other:			
Dispute Resolution Request	If dispute arises	N/A	N/A

*Written monthly case updates submitted by facilitator are to include, but not limited to:

- ✓ Brief overview of any pertinent youth and family information since last monthly update (either Youth & Family team meeting or facilitator check-in)
- ✓ Attendance & progress update of all approved funding requests, to ensure the activity is being utilized and monitored
- ✓ Was a referral made to parent advocate since last monthly update?
- ✓ Did an out-of-home placement occur since last monthly update?
- ✓ Did an exit occur? If so, submit completed Plan of Care with transition & discharge information

**Funding requests submitted by the facilitator will be presented to the Service Coordination Committee for consideration. The results of the funding request will be returned to the facilitator, which will detail approval/denial and required documentation. Funding requests must be aligned with the Strengths and Needs Assessment as well as Plan of Care goals and strategies.