

Tips, Tasks and Tools for Becoming an Organized and Effective Service Coordinator

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“Families tell us that their understandings of their child’s disability and the possibilities for their child’s future were very much influenced by the first person with whom they worked, which is often the Service Coordinator. In many ways, families say the quality of service coordination determined the usefulness of the supports and services they received.”

Reprinted from: Colorado Service Coordination Training Source: Miller, J. and Peterson, S. Colorado Guidelines for Service Coordination, Spring, 1999, p.8

Effective service coordination is an active, ongoing process that assists families in accessing needed services and supports that will enable them to meet the developmental and health needs of their infant and toddler. Service Coordinators must be good listeners, have great organizational skills, be knowledgeable of community resources and be able to facilitate teams through the evaluation and assessment process, IFSP development, and the provision of appropriate services. This resource has been designed to provide Service Coordinators with some basic tips and tools to help them become an organized and effective Service Coordinator whether they are new to the system or have many years of experience.

You’ve Been Selected to be a Child’s and Family’s Service Coordinator Where do you Begin?

- ❖ Be prepared! Review all of the information provided by the referral source prior to speaking or meeting the family for the first time. If you are an on-going Service Coordinator, and you do not receive referral information within five (5) days of your confirmation, call the referring interim or on-going Service Coordinator and ask that the referral information be forwarded to you. This includes the first four pages of the IFSP, and any pertinent assessment information.
- ❖ Become informed! If you are not familiar with the child’s diagnosis or condition, research medical or other information so you become knowledgeable of the child’s possible needs prior to your first contact.
- ❖ Contact the family as soon as you have their phone number or a way to contact them. Introduce yourself and briefly explain your role with WV Birth

to Three. Ask families if this is a good time for your call and if the family has a few moments to talk about how things are going, what their expectations are in regards to Birth to Three, and what their biggest challenges and concerns are for their child. Ask if there is any information you can send them now and let them know you are looking forward to meeting them. Confirm and get directions to family's home.

First Impressions are the Most Important

- ❖ If you are unsure of where the family lives, drive by when you are in the area. On the day of your visit, give yourself enough time to get to the home or community setting to be a few minutes early. Try not to schedule another appointment within a safe period of time so that you do not have to leave the meeting while it is in progress.
- ❖ Always dress appropriately: meaning clean, casual and neat. Some families may be offended by outfits that are too suggestive or not appropriate for the occasion.
- ❖ Be a good listener, when the family or other team members are speaking please don't interrupt. Respect team members' opinions. Everyone brings expertise to the team.
- ❖ Explain to the family that "SOMETIMES" you may have to reschedule a visit when unexpected scheduling conflicts occur and that missed visits will be made up within six months of the missed visit. Do not make a habit of changing or missing scheduled visits. Remember families may select a new Service Coordinator when they are displeased with the services they are receiving.

Being Prepared for Your First Meeting

- ❖ If this is a new family to Birth to Three, they may have MANY questions about Birth to Three services and supports, and what other resources may be available in the community to meet their child's and family's needs. Take the time to ask if the family has questions and answer them completely. As a Service Coordinator, it is YOUR job to help the family understand what comes next, what your role is on the team, and what Birth to Three is really about.

- ❖ If your first visit is the IFSP planning meeting, be ready to help the team in any way. Offer to keep time, take notes, to write the teaming activity note or to provide the Procedural Safeguards for the family.
- ❖ At the IFSP meeting, Service Coordinators assist families in determining their service coordination needs, developing meaningful service coordination outcomes to reflect those needs and then helping families continuously evaluate whether or not the family has achieved their identified outcomes.
- ❖ At the IFSP meeting, determine with the family and team how often and with what method the team will have on-going communication. Set a plan with the family on how you and other team members will confirm scheduled appointments. For example, will team members call the day before or just an hour before the visit to confirm?
- ❖ If your first visit with the family is a service coordination visit, begin with reviewing the IFSP. Ask families how things are going. If the family identifies concerns in regards to IFSP services and supports they are receiving or concerns in new areas of their child's development, schedule an IFSP/team meeting review. This does not take the place of conducting a six month review when due.

After the IFSP is Written

- ❖ As a Service Coordinator, you may add service coordination outcomes as the child's and family's needs change. Remember that service coordination intensity and frequency depends on the child's and family's needs and the outcomes you are working toward achieving. Some families may need service coordination at a higher level of intensity than others due to their unique family circumstance. There may also be additional service coordination needs at entry and exit from the system.
- ❖ During your service coordination visits, review the IFSP with the family. Ask the family, if their concerns and priorities are being addressed through the IFSP and if they have any questions. Assist in linking the family to any needed services and supports and through the transition process.
- ❖ As a Service Coordinator, you are the constant on the child's and family's team. Make sure you keep all team members informed of the family's priorities and concerns, issues, and unique circumstances that may arise. And don't forget the simple things, such as a change of address or phone number.

Being a Good Time Manager

- ❖ Remember to call the family before going to a meeting or a home visit to confirm that it is still a good day and time. If the family does not answer, do not assume that the family will not be home as maybe mom is heading home from shopping.
- ❖ Take your appointment book with you. Most appointment books have places for taking notes, sections for reminders of things to do, etc. Learn to use the appointment book as a planner to keep organized.
- ❖ Double check when you write down dates. We sometimes multi-task too much and mistakes happen. When you write down a time and date, be sure the other team members have the same date and time.
- ❖ At the end of everyday, before you are finished, review your appointment book for the week, but especially the next day. Call families and remind them of visits/meetings that are coming up especially if appointments were made quite a while ago.
- ❖ Give yourself enough time to travel to each visit. This way, if you run into problems such as traffic you still should have enough time to get to your intended location.
- ❖ When scheduling home visits, try to schedule more than one family when you will be traveling to certain geographical areas that you serve.
- ❖ Some families will prefer scheduling your next visit while you are at their home. Other families may want you to call and schedule closer to the visit time based on the intensity and frequency of the IFSP.
- ❖ Some families may want a regular visit, for example every first Monday, or others may have more flexibility and can be scheduled where you have openings. Remember, it is important to meet the service commitments on the IFSP.
- ❖ Have a conversation with all families about your travel time and ask them to always call and cancel a visit they cannot keep.

- ❖ All non-face-to-face conversations with families, other team members, or other parties on behalf of the family must be documented on the Communication/Correspondence Log, including cancellations or scheduling of appointments.
- ❖ Try providing families with calendars so you can mark down your and other team members' visits. Make sure that all families and other team members have your phone number and/or email address as this makes communication easier.
- ❖ Take time each day to return phone calls and emails. Most professional literature recommends returning calls within 48 hours.
- ❖ Develop a "system" of organization so that you send in all completed documentation to the RAU within the required timelines. You might also want to "visit" the RAU regularly and review files, making sure all the necessary documentation is in the correct file. Remember you must have a current Reciprocal Release and Share Information signed by the parent to access files.
- ❖ Utilize technology. Email works great in keeping in touch with families as well as other team members. Scanned documents can be emailed to them. Remember to use a confidentiality statement on the bottom of your email and fax. If you need an example of a good confidentiality statement call your Regional Technical Assistance Specialist at the State office.
- ❖ Develop your own system of keeping track of timelines. This includes the six month review, when to begin coordinating the annual evaluation and assessment process for re-determining eligibility (including updating all appropriate consents and releases), conducting the eligibility/annual IFSP meeting, establishing the Transition Plan at least nine months before the child's third birthday, scheduling a face to face transition planning meeting for all children at least 90 days before their third birthday, and sending letters of invitation to these meetings early enough to allow for participation (10 days prior to meetings).
- ❖ Some organizational tools include:

Use the calendar function on your home computer to get daily reminders of upcoming appointments.

Keep track of all due dates in your appointment book.

Use a three year start process “calendar” that can be used to keep track of all IFSP, review and transition dates.

Use a dry erase board or make charts.

Put all of the due dates and “start IFSP process” dates on the inside cover of your working file for each child.

❖ In regards to scheduling meetings:

Make sure you schedule as far in advance as possible. Many of your team members schedule their time at least (1) one month in advance. This will enable team members to be better at attending all scheduled meetings.

Ask families for at least two to three good dates for scheduling the next meeting.

All team members must be invited to meetings through a written letter of invitation. There may be times when it is impossible for all team members to be present face to face. If you have a large team and/or you think that it may be difficult to get all team members together at the same time, ask the family to “prioritize” which team members need to be at the meeting. **Remember, the Developmental Specialist must conduct a Child Outcome Summary Tool at the Initial and Annual IFSP and prior to exit if the child has an IFSP and has received services for six months or more.**

If a team member cannot be present, encourage them to participate by phone or report. They may also send an authorized representative. If you have to have a meeting without all team members present, it is your responsibility to make sure that those individuals not in attendance have been informed of the purpose of the meeting and, that you have gotten their “input”. Following the meeting, make sure to communicate with individuals not in attendance the results of the team meeting and if there is follow up needed. This may be done by sharing a copy of the Teaming Activity Note.

❖ When concerns begin to arise, such as the family is not home for visits, a family is not returning team members’ calls, or a family has expressed concerns regarding services and supports, schedule an IFSP meeting

immediately. This is a time when it is essential to keep good documentation of all conversations.

Keeping Informed

- ❖ On the WV Birth to Three Website under the Professionals tab, you will find Technical Assistance Bulletins regarding Birth to Three policies and procedures. It is each individual's responsibility to regularly visit the website in order to be informed about all BTT policies and procedures.
- ❖ Attend all required training and review the materials provided. This will help you in understanding your roles and responsibilities as a Birth to Three Service Coordinator.
- ❖ Frequently check the Birth to Three Website for news bulletins, new trainings that are available and new forms that “replace” currently used documents.
- ❖ Become familiar with application processes for other services and supports that families may need. The West Virginia Department of Health and Human Resources website, at www.wvdhhr.org, provides links to many financial and social service programs for families.
- ❖ Participating in interagency groups at the local level will help you to find out about resources unique to those areas.
- ❖ When you can, research and visit related early childhood websites and resources to remain well informed and up to date on the latest information.
- ❖ Contact your Birth to Three Regional Technical Assistance Specialist with questions or issues you may have.