

1301: INTAKE PROCESS

The SoonerStart Resource Coordinator (RC) contacts the family by phone to initiate intake within ten (10) working days of the confirmed referral date. If the parent declines to continue in the SoonerStart process, the referral is cancelled and inactivated.

If the family chooses to proceed with the SoonerStart process, the RC arranges and completes the intake with the family. The purpose of intake is to gather additional information about the child and family, explain the SoonerStart program/process, explore the concerns of the family and determine the next step in the process. The Intake meeting with the family may take place in the family's home, in the SoonerStart office or by telephone.

The family is best served when the intake visit takes place face-to-face. Face-to-face meetings may be held in the family's home, community location or in the SoonerStart office. The advantages of in-person intakes are:

- It allows RCs to use non-verbal cues exhibited by the parent/caregiver to determine any additional questions or levels of explanations needed;
- If held in the family's home, it allows the RC to observe and gather information about the child and family's natural environment;
- It provides an opportunity to complete parental consent documents and conduct a developmental screening in a timely manner, if applicable;
- It is optimal for building rapport and establishing the RC as the staff member responsible for coordinating all SoonerStart services.

If a child has or is suspected to have an automatic qualifying condition, the RC will still complete an intake appointment with the family in person or via telephone before the eligibility determination and/or IFSP.

The RC sends the Meeting Notice (OK-SS Meeting Notice) to the parent for the intake/screening when the meeting with the parent/caregiver is scheduled for a face-to-face visit.

At the intake appointment, the RC provides and/or explains the following to the parent:

- Parent Rights for SoonerStart Services – Notice of Procedural Safeguards
- The SoonerStart Program/Process document
- Systems of Payment and Notification to Parents/**OK-SS-System of Payment (Appendix M)** (RC will notify the family that SoonerStart will seek reimbursement from OHCA/Medicaid for all eligible services if the child is currently enrolled in Medicaid or if they become enrolled in the future.)
- Consent for Medicaid Reimbursement/**OK-SS Medicaid Consent (Appendix T)** with parent and/or guardian signature. If the child has private insurance and Medicaid, the consent may be obtained and uploaded into the child's file documents. Do not enter consent date on the Personal page in EdPlan. *(Does not apply to children who are NOT currently enrolled in SoonerCare)*

All intake information is gathered and documented on the Intake page of EdPlan and includes the following:

- Child's presenting concerns
- Prior and current diagnostic or intervention services
- Relevant medical information
- Birth history of the child
- Medicaid eligibility or potential eligibility
- Attendance to childcare, etc.

During the intake appointment, the RC will also review the family's completed Oklahoma Family Resource Assessment (OFRA) form to determine if there are any "immediate" resource/referral needs that should be addressed with the family. Any resource information/referrals provided by the RC to the family prior to the child's evaluation are documented on the MECATS section of EdPlan in the box titled "RECOMMENDATIONS AND OTHER COMMUNITY RESOURCES AVAILABLE".

During the intake process, the RC determines if a child requires a developmental screening or should immediately be scheduled for an eligibility evaluation. If the child requires a developmental screening, the RC completes the screening as part of the intake appointment. Before the developmental screening is completed the RC must obtain written parental consent for the screening using the **OK-SS-Consent-Screening** form in EdPlan. If the child will go immediately to evaluation or does not pass the developmental screenings, the family is offered an eligibility evaluation (first available) for their child. Upon scheduling the evaluation, a meeting notice is provided to the parent at the intake appointment or sent to them via mail/email. If the parent chooses to not proceed with the SoonerStart process following intake and/or screening, the RC informs the family of how they may access early intervention services at a future date. Following the family's decline to proceed, the child's file is inactivated in EdPlan.

If the child has an automatic qualifying condition, the RC also begins the process of obtaining medical documentation of the child's medical condition and/or diagnosis for program eligibility. Families should be encouraged to obtain and provide necessary medical documentation to the RC. The RC can also obtain parent signature on the **Consent for Release of Confidential Information (Appendix U)** to request needed medical records/documentation from the child's medical provider(s).

Other documents to be completed at Intake:

- **Authorization for Electronic Communication**
- Releases of Confidential Information as needed (medical documentation, childcare center, etc.)
- **OK Family Resource Assessment (OFRA) (Appendix KK)**
- **OK-SS-Consent-Evaluation** – *unless it will be signed at the time of the evaluation*

OFRA Notes...

If the RC completes intake via telephone with a family, the OFRA will be completed by the family at the eligibility evaluation appointment or at the Initial IFSP when the child has an automatic qualifying condition (see below). During the intake call with the family, the RC will still need to ask the family if they have any immediate needs regarding food, shelter, diapers, etc. and address these needs as described above.

Providing the OFRA:

- *Eligibility evaluation – The evaluation team will provide the family with the OFRA at the end of the evaluation for them to complete prior to leaving the appointment. (Evaluation team will scan the OFRA into EdPlan with the other evaluation documents)*
- *Automatic Qualifying Condition – The RC will provide the OFRA to the family at the initial IFSP meeting prior to initiating the OFI/IFSP process.*

****Note:** An intake document with identified talking points has been included in the appendix as a helpful tool to assist in completing the Intake process.