



## CHANGE IDEA: Implement a care coordination checklist with early intervention programs.

### STEP 1: GET READY (TASKS)

- A. Convene a planning team including providers, care coordinators, administrative staff, and Part C and Part B leadership.
- B. Review the need for timely communication and coordination with early intervention programs.
- C. Introduce a [care coordination checklist](#) to improve referrals and follow-up. Include or develop a standardized referral form (Part C or Part B) and [feedback form](#) for the practice.
- D. Obtain agreement on a two-way release of information form signed by the family at the visit.
- E. Define the target population: children ages 0-5 referred to early intervention Part C or B.
- F. Develop communication pathways to confirm service availability for families (e.g., waitlists).
- G. Assign roles: who completes the checklist, communicates with early intervention partners, and documents in the electronic health record (EHR).
- H. Schedule a brief training for relevant staff on using the checklist.

### STEP 2: PLAN AND PRACTICE

- A. Pilot the checklist with one care coordinator and one early intervention program partner for 1 week.
- B. During the pilot, complete the checklist for each new referral to early intervention.
- C. Communicate with the early intervention partner to confirm receipt and follow-up.
- D. Log referrals and checklist completion in a tracking system.
- E. Collect feedback from staff and the early intervention partner.

### STEP 3: REVIEW AND REFINE

- A. Hold a brief review huddle with staff involved in the pilot.
- B. Assess how many checklists were completed and whether follow-up improved.
- C. Discuss time burden, usability, and staff feedback.
- D. Identify any workflow issues or points of confusion.

### STEP 4: EXPAND

- A. Update the checklist or process based on feedback.
- B. Expand to additional care coordinators and, if feasible, another early intervention partner.
- C. Continue regular check-ins to track use and troubleshoot.

### STEP 5: SUSTAIN

- A. Integrate the checklist into standard care coordination operations.

- B. Include in new staff onboarding.
- C. Share metrics and success stories.
- D. Review the process annually to ensure relevance and effectiveness.
- E. Use data from expanded use to refine checklist content or documentation workflows.
- F. Incorporate checklist steps into care coordination protocols or EHR templates.
- G. Provide ongoing support or refresher training.