



## 26.5 Eligibility Tracking

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## 26.5 Eligibility Tracking

In this lesson you will enter 26.5 eligibility tracking information into Avatar. You will see that the clinician provides the information required for this window in a Face Sheet. The administrator only needs to copy the information from the Face Sheet.

You will learn that an IEP document must be submitted with the Face Sheet and that you should not enter data in Avatar without an IEP since it is a State requirement for billing.

**NOTE:** Because the administrator only needs to copy information provided by the clinician, there is no hands-on exercise or quick reference guide for this lesson.

### Lesson Objectives

- State the purpose for eligibility tracking
- Understand that an IEP document is required before you can enter data in this window
- Be aware that you must scan the IEP into Avatar

## UNDERSTANDING CHAPTER 26.5 ELIGIBILITY TRACKING

Chapter 26.5 covers mental health services for special education students. Children and youths enrolled in special education programs are eligible to receive mental health services through their Individual Education Plan (IEP) if assessments determine that mental health services are necessary for the children/youths to benefit from their educational programs.

Tracking begins when the Central Assessment Team (CAT) first determines eligibility, and then a history of eligibility is maintained whenever a new 26.5-related IEP occurs. The State requires proof of eligibility for billing. A current IEP must be on file that specifies 26.5 services in order to bill for those services.

The clinician for the service to whom a child/youth is assigned provides the administrator with two paper documents:

- The IEP, which is scanned into Avatar
- A Data Entry and Scanning Cover Sheet—the administrator enters the data from the Face Sheet into Avatar

## WHO CAN PERFORM THIS FUNCTION?

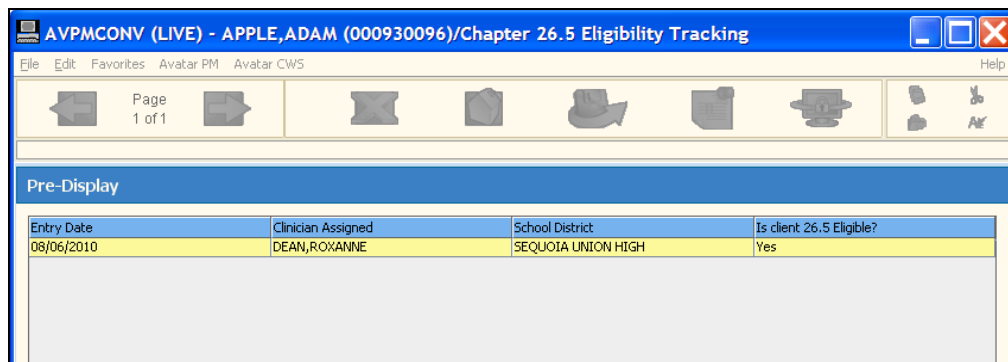
Administrators perform this function.

## MENU PATH

Avatar PM→New Options→Chapter 26.5 Eligibility Tracking

## 26.5 PRE-DISPLAY SCREEN

Each row on the Pre-Display screen represents a 26.5 cycle from beginning to end. It begins when there is a referral and is only closed when all 26.5 services have been closed. If the client is re-referred then a new row is created by clicking the Add button.



Entry Date	Clinician Assigned	School District	Is client 26.5 Eligible?
08/06/2010	DEAN, ROXANNE	SEQUOIA UNION HIGH	Yes

## 26.5 ELIGIBILITY TRACKING PAGE 1

A staff member at the Central Assessment Team completes the information in this tab. Tracking begins when a referral packet arrives. If a client has never been opened to the system then they are assigned a P # with Call Intake.

Field	Description
A) Date Assessment Plan Received	This is the date the signed Assessment Plan is received from the family.
B) County Name	This field defaults to San Mateo. Chapter 26.5 eligibility is valid throughout the state. There will be times a client is eligible in another county. Consult with Central Assessment Team Unit Chief or 26.5 Compliance Coordinator.
C) Contact Name Contact Phone	This is the name and phone number of the person in the school district who made the referral.
D) Clinician Assigned	This is the name of the clinician who is assigned to complete the assessment, and this is typically someone from the CAT team. Occasionally, another clinician conducts the assessment but only with approval from the CAT team.
E) Assessment I.E.P. Due Date	This date is determined by the Unit Chief for the Central Assessment Team or the 26.5 Compliance Coordinator.

## 26.5 ELIGIBILITY TRACKING PAGE 2

The information for this page is located in the clinician-provided Face Sheet.

Field	Description
A) Date of 26.5 Eligibility IEP	This is the date of the IEP meeting when the client was made eligible.
B) Date of Next ANNUAL IEP	This is the date of the client's next annual IEP, which is scheduled by the school district. That date is indicated on the Face Sheet of all IEPs.

## NON-RESPONSE TRACKING TAB

Use this tab to track attempts to contact the client's parent(s)/guardian to obtain a signature for the Assessment Plan.

AVPMCONV (LIVE) - APPLE, ADAM (000930096)/Chapter 26.5 Eligibility Tracking

File Edit Favorites Avatar PM Avatar CWS Help

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APPLE, ADAM (000930096) Date Of Birth: 03/01/1980; Sex: Male

**26.5 Eligibility Tracking** Consent Tracking I.E.P. History Closure of 26.5 Services

Date of Letter #1  
08/06/2010 T Y

Comment urgent assessmnet plan residential request

Date of Letter #2  
08/27/2010 T Y

Comment if not received in 2 week will contact district

Date of Letter #3  
09/14/2010 T Y

Comment

Date Referred Back to District  
09/01/2010 T Y

Comments / Notes  
8/6/2010 RJD - crap missing, lousy referral  
9/1/2010 client declined assessment district notified

Option Complete

Chapter 26.5 Eligibility Tracking Chart Review

## IEP HISTORY TAB (IEP HISTORY) PAGE 1

The administrator at the assigned service location of the child/youth creates a new entry in the IEP Tracking Option table upon receiving an IEP and Face Sheet from the responsible clinician. The data for this page is located on the Face Sheet.



### IMPORTANT

The administrator should not enter the data without an IEP. An IEP is required by the State as proof of eligibility so BHRS can bill for services. (The IEP must be scanned into Avatar.) Enter information on this page based on the Data Entry and Scanning Cover Sheet provided by the clinician.

AVPMCONV (LIVE) - BLUEBELL, BETSY (000930074)/Chapter 26.5 Eligibility Tracking

File Edit Favorites Avatar PM Avatar CWS Avatar MSO Help

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BLUEBELL, BETSY (000930074)

26.5 Eligibility Tracking Non-Response Tracking I.E.P. History Closure of 26.5 Services

IEP History Eligibility Clinician and Comments

IEP Tracking Option

Date of I.E.P.	I.E.P. Type (Purpose of Meeting)	Special Education Eligibility Status	26.5 Eligible (must be documented on I.E.P.)
03/05/2010	Initial	250-Visually Impaired	Yes

Add New Item Edit Selected Item Delete Selected Item

ONLY FOR 26.5 ELIGIBLE CLIENTS

Date of I.E.P. 03/05/2010 T Y

Next ANNUAL I.E.P. Date 09/08/2010 T Y

I.E.P. Type (Purpose of Meeting)

Initial
  Annual
  Triennial  
 Transition
  Pre-Expulsion
  Interim  
 Expanded I.E.P.
  Amendment/Addendum
  Other

Other Addendum to I.E.P. dated

Continue to next page for 26.5 and IEP Eligibility



## IEP HISTORY TAB (ELIGIBILITY) PAGE 2

Use this page to specify the status through which the child/youth is eligible for special education. The information appears on the Data Entry and Scanning Cover Sheet provided by the clinician.

Field	Description
A) Special Education Eligibility Category	If the status is not available, check one of these: <ul style="list-style-type: none"> <li>Eligible, Disability not Specified</li> <li>OR</li> <li>Unknown</li> </ul>
B) 26.5 Eligible, Is a Progress Report Attached, Are Mental Health Goals Attached?	This information will be on the Data Entry and Scanning Cover Sheet and is on every IEP.

## IEP HISTORY TAB (CLINICIAN AND COMMENTS) PAGE 3

The information for this page comes from the Data Entry and Scanning Cover Sheet provided by the clinician. For 26.5 IEPs, clinicians are required to attend the IEP meeting.

Field	Description
A) Did a Clinician Attend I.E.P.?	For 26.5 IEPs, clinicians are required to attend the IEP meeting.
B) Comments / Remarks	This field is for any information the clinician believes is important to document about this IEP meeting.

## CLOSURE OF 26.5 SERVICES TAB

The information for the closure of services is specified on the Data Entry and Scanning Cover Sheet. This tab is only completed when 26.5 services are being discontinued for one of the reasons provided in Closing Disposition field.

Field	Description
A) 26.5 Eligibility Continues	This field will auto select the correct value based on what you select for the Closing Disposition field.
B) Closing Comments	This field is for documenting circumstances of the outcome.

## HOW DO YOU GENERATE BILLING FOR A 26.5 CHILD/YOUTH?



### IMPORTANT

You must enter Guarantor 700, IEP – 26.5 in the Guarantor Information table in Financial Eligibility. (See the Financial Eligibility lesson for details.)