

# **26.5 Eligibility Tracking**

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# watar 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.

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Pre-Display									
Entry Date		Clinician A:	ssigned	Scho	ool District	I	is client 26.5 Eligible?		
08/06/2010		DEAN,RO>	ANNE	SEQ	UOIA UNION HIGH	N	/es		

#### 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.

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Page 1 of 2     Page 1 of 2 <th>Eile Edit Favorites Avatar PM Avatar CW5</th> <th>Help</th>	Eile Edit Favorites Avatar PM Avatar CW5	Help
APPLE,ADAM (000930096) Date Of Birth: 03/01/1980; Sex Male         28.5 Eligibility Tracking       Consent Tracking       ELP. History       Closure of 26.5 Serivces         Eligibility Tracking       Eligibility and Comments       Is client 26.5 Eligible?         Entry Date       Is client 26.5 Eligible?       Yes         Date Referral Packet Received from School District       Contact Name         Date Referral Packet Received from School District       Contact Name         School District       Contact Name         Security Autonon High       Contact Name         BEQUOIA UNION High       Contact Name         Date Assessment Plan Received       Contact Phone         08/16/2010       T       Y         Date Case Assigned / Letter Sent       Olinician Assigned         08/16/2010       T       Y         Ostifi/2010       T       Y         Optification       T       Y         Optification       T       Y	Page 1 of 2	🛛 💟 🐸 🦉 🚰
Z5.5 Eligibility Tracking       Consent Tracking       LEP. History       Closure of 25.5 Serives         Eligibility Tracking       Eligibility and Comments       Is client 26.5 Eligible?         Entry Date       08/06/2010       Y       Image: Complexity of the comments         Date Referral Packet Received from School District       Yes       No       Assessment         Date Referral Packet Received from School District       Contact Name       Image: Contact Name         School District       Contact Name       Image: Contact Name         School District       Contact Phone       Image: Contact Phone         Call MLS. to add a School District to the list.       Clinician Assigned       Process Search         Date Case Assigned / Letter Sent       OB/16/2010       Yes       Unique Practitioner ID         Deta Case Assigned / Letter Sent       OB/16/2010       Yes       Image: Contact Name         Ob/16/2010       Yes       Image: Contact Name       Image: Contact Name         Option       Image: Contact Name       Image: Contact Name       Image: Contact Name         Date Case Assigned / Letter Sent       Ome       Image: Contact Name       Image: Contact Phone         Option       Yes       Image: Contact Name       Image: Contact Name       Image: Contact Name         Date Case Assig	APPLE, ADAM (000930096) Date Of Birth: 03/01/1980; Sex:	Male
Eligibility Tracking Eligibility and Comments   Entry Date Is client 26.5 Eligible?   08/06/2010 I   I I   Date Referral Packet Received from School District   08/06/2010 I   I I   School District   School District   SecouDia UNION HIGH   Call M.I.S. to add a School District to the list.   Date Assessment Plan Received   08/10/2010   I   Date Case Assigned / Letter Sent   08/16/2010   I   I   Complete	26.5 Eligibility Tracking Consent Tracking I.E.P. Hist	ory Closure of 26.5 Serivces
Date Referral Packet Received from School District   DB/06/2010   T   School District   School District   School District   School District   Call M.I.S. to add a School District to the list.   Date Assessment Plan Received   Date Case Assigned / Letter Sent   DB/16/2010   T   V     Complete	Eligibility Tracking Eligibility and Comments Entry Date 08/06/2010 T Y	S client 26.5 Eligible? ● Yes ○ No ○ Assessment
School District   Sequoia UNION HIGH   Call M.I.S. to add a School District to the list.     Date Assessment Plan Received   08/13/2010   T   08/16/2010   T   V     Complete	Date Referral Packet Received from School District	
Option         Option         Complete	Call M.I.S. to add a School District to the list.	Contact Phone 369-1411 Clinician Assigned
Date Case Assigned / Letter Jetter       D8/16/2010       T       Y       Assessment I.E.P. Due Date       10/13/2010       T       Y	Date Case Accigned (Letter Sent	
Option       Complete		Name/ID Number     O Unique Practitioner ID
Option Complete		DEAN,ROXANNE (051256)           Assessment I.E.P. Due Date           10/13/2010
Complete	Orton	
Hill Chapter 26 E Elizibility Type line		

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.

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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	f 26.5 Serivces	
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		- ma
8/5/2010 RDD - crap missing, lousy referral 9/1/2010 client declined assessment district notified		
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.

## 

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.

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BLUEBELL,BETSY (000930074)			
26.5 Eligibility Tracking Non-Response Track	ing I.E.P. History Closure of 26.5 Serivces		
IEP History Eligibility Clinician and	Comments		
IEP Tracking Option			
Date of I.E.P. I.E.P. Type (Purpose of Meeting) 03/05/2010 Toitial	Special Education Eligibility Status 26.5 Eligit 250-Visually Impaired Yes	ble (must be documented on I.E.P.)	
actosterro la sura	Loo hodan) Impared		
•			Þ
Add New Item	Edit Selected Item Delet	e Selected Item	
	ONLY FOR 26.5 ELIGIBLE CLIENTS		-
Date of I.E.P.	Next ANNUAL I.E.P. Date		
03/05/2010 T Y	09/08/2010 T	Y	
I.E.P. Type (Purpose of Meeting)			
Initial	Annual O Tri	ennial	
C Expanded I.E.P.	Amendment/Addendum	erim	
Other	<ul> <li>Addendum to LE P dated</li> </ul>		
Other	Addendum to I.E.P. dated	Y	

#### 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.

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	APPLE,ADAM (000930096) Date Of Bit Forward 1980; Sex: Male	
	26.5 Eligibility Tracking Consent Tracking LE.P. History Closure of 26.5 Serivces	
4—	IEP History         Eligibility         Clinician and Comments           Special Education Eligibility Category         210-Mental Retardation         220-Hard of Hearing           230-Deaf         240-Speech/Language Impaired         240-Speech/Language Impaired	
	250-Visually Impaired       260-Emotionally Disturbed         270-Orthopedically Impaired       280 Other Health Impaired         281-Established Med. Disability(age 0-5)       290-Specific Learning Disability         300-Deaf - Blind       310-Multiple Disabilities         320-Autistic       330-Traumatic Brain Injury	
<b>_</b>	Eligible, Disability not Specified     Instantiation Not Applicable     Instantiation     Not Applicable     Instantiation     Are Mental Health Goals Attached?     Yes     No	]
D	S a Progress Report Attached? Yes O No	
	District  Please call M.I.S. to add a School District to the list.	
	School Placement	
	Option	
	Complete	
	🗒 Chapter 26.5 Eligibility Tracking	

Field	Description
A) Special Education Eligibility Category	<ul> <li>If the status is not available, check one of these:</li> <li>Eligible, Disability not Specified 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.

P	age 3 of 3						÷	
BLUEBELL,BETSY	(000930074) cking Non-	Response Tracking	I.E.P. History	Closure of	26.5 Serivces			
IEP History Did a Clinician Al O Yes	Eligibility Itend I.E.P?	Clinician and Comn	nents	Clinician	Attending I.E.P.		Process Se	arch
				Name	e/ID Number	O Uniqi	ue Practitioner ID	~
Comments / Rem	arks						D)	

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.

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APPLE,ADAM (000930096) Date Of E	irth: 03/01/1980; Sex: Male		
26.5 Eligibility Tracking Consent	racking I.E.P. History Closure of 26.5 Se	erivces	
<ul> <li>Discharged from 26.5</li> <li>Moved out of County</li> <li>No Response</li> </ul>	<ul> <li>Family Declined Services</li> <li>Found Not Eligible</li> <li>Other</li> </ul>	<ul> <li>Family Terminated 26.5 Eligibility</li> <li>Declined Assessment</li> </ul>	
26.5 Eligiblity End Date	26.5 Elig ● Yes	ibility Continues	
Closing Comments			
_		7	

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?



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