

North Carolina Infant-Toddler Program Provider Monthly Summary Note: Instructions

Purpose: For CDSA enrolled providers to document a monthly service history and a monthly summary of progress for children whom that are providing ITP services as authorized through an IFSP.

If this form is altered or a different service note / billing ticket form is used by a provider, all of the following required elements must be included in the form being used.

Instructions: Fill in all blanks in the top section with the information requested. List the IFSP outcome numbers to be addressed and include a brief description of each outcome. These outcomes **must** match current outcomes on the family's Infant-Toddler Program IFSP.

Enter the following information in the center section for each date of service or contact.

1. Svc Date: Enter the date of service or contact.
2. Proc. Code: Enter the procedure code that corresponds with the service being provided.
3. # Units: Enter the number of units to be billed as determined by the duration of the service and the type of service provided.
4. # Minutes: Enter the duration of the service provided in minutes.
5. POS: Use the legend provided and enter the code that corresponds with the primary place of service for that billable or reportable event.

In the narrative section, provide a summary that describe the primary interventions used over the course of the month, the effectiveness of those interventions, and the achievements and measurable progress toward IFSP outcomes, including any difficulties encountered in the provision of the service.

The monthly summary should demonstrate that adequate and appropriate services were rendered as outlined on the IFSP. Provide explanations as to why a service may not have been provided at the frequency and intensity specified on the IFSP. Possible examples may include a family vacation, child illness or a family no showed a schedule appointment. Permanent changes regarding the provision of ITP services **must** be made within the context of the IFSP process.

Disposition: Infant-Toddler Program records, including financial and automated information, must be maintained based upon the Infant Toddler Program's record retention policy. Records must be archived in accordance with state requirements to ensure their preservation for the required length of time.