

Developmental Behavioral Pediatrics Referral, Assessment and Services Checklist

	KEY TASKS	DATE COMPLETED/ TEAM MEMBER	TIMEFRAME
REFERRAL STAGE	Confirm referral placed by PCP and reason for referral is clearly identifiable		
	Check-in with family: <ul style="list-style-type: none"> • Share information re: referral to DBP and why • Provide education, address family’s concerns, and explore benefits and challenges • If family declines or is hesitant – loop PCP in and continue to provide support as needed • If family consents to referral, explain referral process 		
	Collect releases for EI, school, or other providers as necessary		
	Work with family to gather IFSP, 504 Plan, IEP, or other documents		
	Complete referral cover letter and send to DBP with IFSP, other documents		
	Support family to schedule evaluation appointment(s) and develop plan for attending appointment <ul style="list-style-type: none"> • If PT-1 is needed, begin process early to ensure it is scheduled in time 		Referrals take 3-10 business days for CHCs not on Epic
	Document details in EMR: <ul style="list-style-type: none"> • Dates and details of scheduled DBP appointments • All work performed, provider’s information • Set reminder to call family 3 days before scheduled appointment(s) 		
	Call family 3 days before scheduled evaluation appointment(s): <ul style="list-style-type: none"> • If using PT-1, confirm requests have been placed • Review intake and evaluation process • Offer/set-up after visit follow-up 		
	For missed appointments, help with rescheduling: <ul style="list-style-type: none"> • Assist with scheduling additional appointment(s) if necessary • Set reminder to call family 3 days before appointment(s) • If using PT-1, confirm requests have been placed 		
	Check-in with DBP and family after the completed evaluation appointment(s): <ul style="list-style-type: none"> • Answer questions or concerns family may have • Explain feedback appointment and process • Prepare family for potential diagnosis and remind parents that PCP and BHI team will continue to support and assist regardless of outcome 		
	Support feedback process: <ul style="list-style-type: none"> • Assist family in scheduling feedback appointment • Schedule check-in visit/call with family within 2 weeks of feedback appointment 		Feedback to occur 1-2 weeks after evaluation

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SERVICES STAGE	Get copy of DBP report and ensure it is documented in EMR for PCP review, confer with PCP on needed referrals		
	Call/meet with family and review DBP recommendations together		
	Explain available services and process for connecting to services		
	If child under 3 years: <ul style="list-style-type: none"> Ensure family gives DBP report to EI service coordinator, place referral for EI if not already involved 		
	If child at least 2 years, 9 months: <ul style="list-style-type: none"> Assist with request for IEP testing If EI is involved, request for EI service coordinator to assist with transition to school 		
	If child is > 3 years: <ul style="list-style-type: none"> Follow up with family/school to make sure appropriate services are in place or plan to begin, e.g., ASD specialty classroom, pullout services for speech, OT, PT, ABA supports, etc. 		
	Apply for home-based services if child is > 3 years and has ASD diagnosis		
	Remind family about DBP follow up visit, if applicable		
	Offer parent group resources to family		
	OPTIONAL	Complete Supplementary Security Income (SSI) application	
Complete Dept. of Developmental Services (DDS) application			
Complete Medicaid application (families with private insurance)			
Complete autism waiver application			
Complete placard application			
Complete personal care attendant (PCA) referral			
Connect family with other resources as needed			