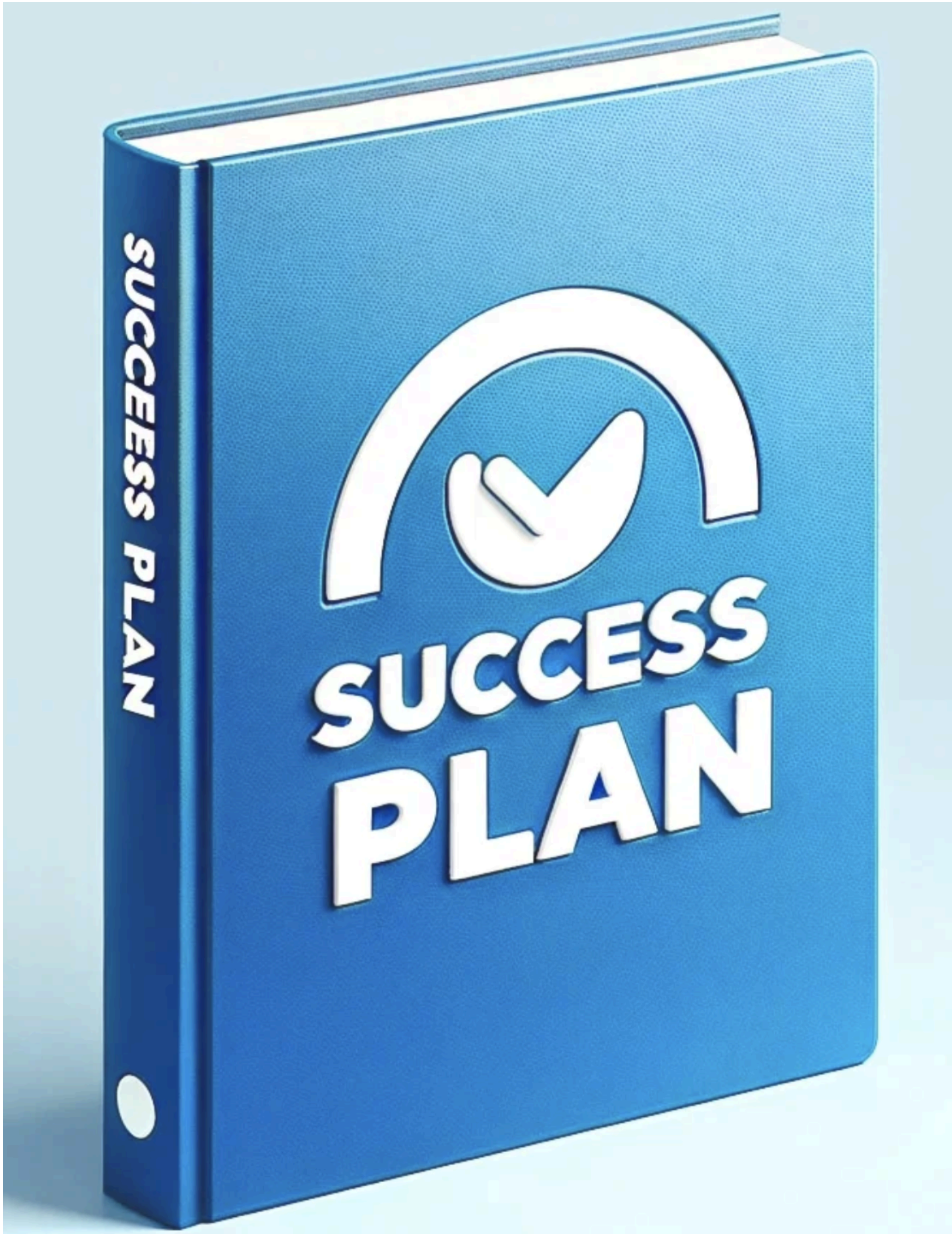
SUCCESS PLAN



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Welcoming Video

Play Welcoming Video

The mission of the Transitional Coach Model is to provide comprehensive support to students by addressing their academic, behavioral, and emotional needs. This is achieved through a structured approach that includes initial assessments, student and family engagement, the implementation of direct and indirect services, and ongoing collaboration with school staff and families. The goal is to create a supportive environment where students can thrive academically, socially, and emotionally, ultimately helping them achieve their full potential.

(Chapter One) Month One….The Runway!

The initial phase of implementing any comprehensive program is critical, setting the foundation for its success and effectiveness. As you embark on the first month of this transformative journey, dubbed "The Runway," we must understand that the steps you take now will pave the way for successfully integrating the model into the school environment. This section is designed to guide Transitional Coaches through the crucial initial steps to launch the program effectively. From establishing key meetings with school administration and teachers to engaging students and legal guardians, each step is structured to ensure the program's infrastructure is robust, compliant, and ready to deliver the intended support services.

The first month is about laying the groundwork—ensuring that all systems, processes, and stakeholders are aligned and prepared for the program's rollout. It involves meticulous planning, coordination, and engagement activities that are essential for the smooth operation and success of the program. By focusing on the Grantee Readiness Profile, engaging with students and their families, and setting up the Access Center, Transitional Coaches will build a solid foundation for the program. This period is not just about preparation; it's about creating momentum to drive the program forward. With a clear focus on the outlined steps, Transitional Coaches can ensure they are on track to meet the program's goals and significantly impact the students' lives they aim to support.

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Step 1: School Administration and Grantor Meeting and Review

- Schedule a meeting with the school administration and the Grant Manager on or before the first day of campus.
- Review the Grantee Readiness Profile together. (This document was I will be emailed to you)
- Discuss all elements of the school readiness checklist thoroughly with the school principal and grant manager.

Grantee Readiness Profile

This document outlines the month-one goals of the grant program, including establishing and operating an Access Center, enrolling students in mental health support services, and defining the roles and responsibilities of school staff.

Key areas include:

- Access Center Setup: This HIPAA-compliant space is dedicated to the Transitional Coach, who will conduct group and individual mental health support sessions.
- Student Enrollment and Service Delivery: Enroll 40 students with signed registration forms and provide group and individual mental health support sessions.
- Staff Roles and Responsibilities: Designating specific staff members for tasks such as HR background screening, parental consent for student enrollment, academic scheduling, and technology support.

To prepare for program implementation, the Transitional Coach should focus on understanding the accountability goals, ensuring the Access Center is appropriately configured, coordinating with designated staff for student enrollment and scheduling, and contributing to the planning and delivery of the mental health support services outlined in the document.

Step 2: Initial Student EWI Profile

- Review the initial Student EWI Profile emailed to you, along with the Grantee Readiness Profile.
- Complete Section C
- Upload the correct Excel-formatted EWI document. Make sure you create your email (not a school email account)
    - Expect an email within 48 hours that identifies students approved for the program and includes written instructions.

Step 3: Initiate Student and Legal Guardian Engagement

Student Engagement. TCs must only work with "approved" students during the first month. You should only enroll "pending" students in the second month, following the Student Eligibility Verification Process.

1. Student Introduction: Using your approval list, begin inviting students from their classes to introduce the program using the Student Engagement Script.

You should work with your Point of Contact for assistance.

2. Provide Program Registration Form:

If a student expresses interest in the program, provide the student with one or more of the following Program Registration Form types

i. Paper-Based Program Registration Form.
ii. E-Signature Program Registration Form: Email the E-Signature Program Registration Form to the student and their parents to receive a quicker response.
iii. Verbal Consent Form: Use the Verbal Consent Form to authorize the student's participation.

3. Return of Signed Program Registration Form: Instruct the student to return the signed form to you ASAP. You may need to contact the student daily until they return the Form. Consider offering special incentives, such as pizza parties, to encourage prompt Form returns.

Family Engagement, Legal Guardian Phone Call/Video Meeting

Quickly engaging family members in enrollment is critical to successfully building your caseload. Remember, Family members of students in the program often receive hostile phone calls from the school. So, be friendly and inviting.

1. Utilize the Parent Phone Script when contacting the students' legal guardian (s). You should work with your Point of Contact for assistance.
2. If the legal guardian agrees to the student's participation in the program, promptly transition the conversation into a consultation or family therapy session. The primary goals of this session are to (1) establish rapport with the legal guardian, (2) gather pertinent information about the student's background, and (3) present concerns with a focus on student attendance, behavior, and grades.
3. Request permission to text and email the guardian consistently. You can bill for such services as family therapy and consultation.

4. Complete the Verbal Consent Form documenting the legal guardian granting program participation and upload the Verbal Consent Form into the student record within the Electronic Medical Record (EMR).
5. Document the encounter in the EMR as a therapeutic or consultation note. Ensure that the documentation accurately reflects the discussion.

Step 4: Student Enrollment

Once you have received the returned signed Program Registration Form, enroll the student into the program by completing the following steps. Reminder: do not enroll a student who has not been identified as "approved" in the email notification.

- Upload Registration Form:
    - Upload the completed Program Registration Form into the student's Electronic Medical Record (EMR) record.

4. Document the provided Provisional Biopsychosocial Assessment located in Section D of the students' Eligibility results.

Step 5: Implement Program Services

Now that students are enrolled on your caseload, deliver and coordinate the service activities below according to each student's clinical needs. Each service is provided when it is clinically indicated for that student, and documented to the standards in the Clinical Documentation Guide — the treatment-plan goal addressed, the intervention delivered, the student's response, and the start time, stop time, and total minutes. Manage your caseload to the level at which you can deliver and document every service to that standard.

1. Direct Service Activities

    1.1. Biopsychosocial Activities: Actions related to assessing and addressing the biological, psychological, and social aspects of students' well-being within the context of a mental health program. This includes documenting provisional Biopsychosocial (BPS) assessments for all students determined and approved by eligibility services, which involves gathering information about students' biological, psychological, and social functioning to inform treatment and intervention planning.

    1.2. Brief Behavioral Therapy Activities: Focused therapy addresses specific behaviors and uses targeted interventions and coping skills. This is at most 16 minutes in duration.

1.3. Individual Therapy Activities: One-on-one counseling to address personal challenges and improve mental health. This is at most 30 minutes in duration.

1.4. Group Therapy Activities: Therapeutic sessions with a small group promote personal growth and support. These sessions last no more than 30 minutes.

1.5. Classroom Observation Activity: A mental health classroom observation involves the TC observing the classroom environment, student behavior, and teacher-student interactions to assess students' mental health and well-being.

2. Indirect Service Activities

2.1. Program Registration Activities involve enrolling students in the mental health program and obtaining necessary consent or authorization forms. This includes uploading all verbal consent forms for students identified and approved by eligibility services, and ensuring that students and their legal guardians have provided consent to participate in the program.

2.2. Student Consultation Activities: Interactions with individual students to introduce them to the mental health program and provide information or support. This includes removing approved students from class, introducing the program to them, and documenting the meeting as a consultation service. This is at most 10 minutes in duration.

2.3. Point of Contact Activities: Interactions with designated points of contact (PoC) within the school administration or mental health program to discuss caseloads and coordinate services. This includes examining the entire caseload approved for services with the PoC and documenting those discussions as consultation services.

2.4. Teacher Coordination Activities: Actions taken to coordinate mental health services with students' core subject teachers. This includes introducing oneself to the teachers of students committed to the program during the week, coordinating consultations with them, and documenting these services as consultation activities.

2.5. Parent Coordination Activities: Actions taken to engage parents or legal guardians of students enrolled in the program. This includes introducing oneself to the student's parents or legal guardians and documenting these interactions as consultation or family therapy notes.

Step 6: Weekly Accountability Goals

To facilitate achieving program productivity standards during the first four weeks as a Transitional Coach, the program's implementation is organized into weekly objectives. The objectives are presented as a task-based checklist that helps you focus on core activities and self-audit your progress toward the weekly accountability goals.

The Weekly Accountability Goals are organized by workdays: Day 1-5, Day 6-10, Day 11-15, and Day 15-20. Please carefully review the weekly activities, as they vary each week. Accomplishing each week's Accountability Goals will ensure your ability to earn approximately $2500.00 per week when your caseload stabilizes in the 5th week. Remember, these are minimum program goals. You can increase your output to earn more if you like.

Weekly Accountability Tool

(Chapter Two) Month Two and Thereafter…Take Off!

The transition from the initial month of embedding into the role of a Transitional Coach to the subsequent months signifies a crucial phase in the educational journey of both the coach and their students. During the second month and thereafter, the focus shifts to the sustained application of foundational activities established in the first month, emphasizing deepening engagement and support for students. This period, often called the "Take Off" phase, is characterized by a more structured approach to addressing students' Attendance, Behavior, and Grades (ABG), necessitating a collaborative effort with families, school personnel, and other stakeholders. It is a time when Transitional Coaches solidify their impact through the strategic implementation of Grading Period Activities designed to monitor and support student progress across all four grading periods of the academic year.

To ensure a comprehensive support system, the Transitional Coach engages in a series of steps, beginning with a review of the previous year's data to identify patterns and areas for improvement. This is followed by establishing clear communication channels and collaborative meetings with stakeholders in a student's education. Creating Grading Period Plans, including baseline assessments and targeted intervention strategies, forms the backbone of this phase. Moreover, the coach's role extends to coordinating collaborative meetings and interventions, such as IEP and Student Support Team Meetings, to tailor support to each student's unique needs. As the year progresses, the Transitional Coach continues to adapt and refine their approach, ensuring the support provided is both practical and responsive to their students' evolving needs.

Per Grading Period Activities

Once you've enrolled at least 20 students and consistently completed the service activities outlined in Steps 1 - 6, Step 7 naturally follows to ensure you provide comprehensive support as a Transitional Coach at the school. Grading Period Activities involve creating a clear plan to address students' Attendance, Behavior, and Grades (ABG). This plan requires collaboration with students' families, school points of contact (POC), and core subject teachers. It covers all four grading periods of the academic year, including the previous school year's final period, ensuring ongoing support and progress tracking.

[Grading Period Progress Monitor Tool]

Implementing Per-Grading-Period Activities

1. Pre-Plan Steps:
    a. Review of Previous Year's Last Grading Period Data:
        i. Collect and analyze data on attendance, behavior, and grades from the last grading period of the previous school year for each student on the caseload.
        ii. Identify patterns or areas of concern that need ongoing monitoring or intervention.
2. Initial Setup:
    a. Schedule an initial meeting with each student's family member, school PoC, and core subject teachers to discuss the plan and set collective goals.
    b. Establish a consistent communication method (e.g., email, text, school portal, monthly meetings) for updates and concerns.
3. Grading Period Plans:
    a. Grading Periods 1 through 4:
        i. Baseline Assessment: Conduct individual assessments to establish a baseline for each student's attendance, behavior, and grades.
            1. Set realistic and measurable goals with each student and their support system.
                a. Intervention Strategies:
                b. Implement targeted interventions based on the baseline assessment (e.g., behavioral contracts, attendance incentives, tutoring sessions).

2. Progress Report
    a. Continue with successful interventions or introduce new strategies to address emerging concerns.

ii. Documentation:
    1. Document all meetings, assessments, interventions, and communications in a secure, confidential system that follows mental health documentation standards.

Collaborative Meetings and Interventions

In this section, Transitional Coaches will find information and guidance on engaging in collaborative meetings and interventions to support students' academic, behavioral, and emotional needs. These meetings are crucial in developing tailored plans and interventions to address students' diverse needs within the school setting. Transitional Coaches are encouraged to actively participate in these collaborative efforts to promote student success and well-being.

As a Transitional Coach, you are responsible for working closely with your designated Point of Contact (PoC) to ensure you are actively involved and participating in collaborative meetings and interventions related to student support.

Transitional Coaches should leverage collaborative meetings to expand their caseload through active referrals and discussions on the progress of their existing caseload, which can be documented as consultation activities.

Types of Collaborative Meetings and Interventions

1. IEP Meetings: These are collaborative meetings in which educators, parents, and specialists develop an Individualized Education Program (IEP) tailored to meet the unique academic and behavioral needs of students with disabilities.

    a. Example: Transitional Coaches collaborate with special education teachers and administrators to ensure that behavioral and emotional needs are addressed in students' IEP goals.

2. 504 Plan Meetings: Meetings are needed to develop a 504 plan that provides accommodations and modifications for students with disabilities who do not require specialized instruction.
    a. Example: Transitional Coaches work closely with school counselors and administrators to identify students who may benefit from a 504 plan due to behavioral or emotional challenges.

3. Student Support Team (SST) Meetings: Definition: Collaborative meetings where educators, counselors, and support staff discuss and develop intervention plans for students experiencing academic or behavioral difficulties.
    a. Example: Transitional Coaches collaborate with teachers and counselors to identify students who require additional behavioral or emotional support and develop intervention plans within the Student Support Team (SST) framework.

4. Disciplinary Hearings or Conferences: Definition: Meetings to address student misconduct or violations of school policies, where administrators, educators, parents, and sometimes students discuss incidents, determine consequences, and develop plans to address and prevent future behavior issues.
    a. Example: Transitional Coaches provide expertise in mental health assessment and intervention during disciplinary hearings or conferences to inform decisions and advocate for restorative justice practices.

5. Parent-Teacher Conferences: Definition: Meetings between teachers and parents to discuss students' academic progress, behavior, and overall well-being.
    a. Example: Transitional Coaches collaborate with teachers to gather information about students' behavioral and emotional functioning in the classroom and attend parent-teacher conferences to share insights from a mental health perspective.

6. Restorative Justice Circles or Meetings: Definition: Processes or meetings that bring together affected parties to address conflicts, repair harm, and promote positive relationships within the school community.
    a. Example: Transitional Coaches collaborate with school administrators and counselors to facilitate restorative justice circles or meetings to address conflicts, repair harm, and promote positive relationships among students, staff, and families.

Collaborative Student Support System Monitoring Tool

Final Thoughts

Please note that while specific meetings and interventions, such as IEP Meetings, 504 Plan Meetings, Student Support Team (SST) Meetings, Disciplinary Hearings or Conferences, Parent-Teacher Conferences, and Restorative Justice Circles or Meetings, play a critical role in supporting students, not all of these are within the direct purview of Transitional Coaches. Transitional Coaches' responsibility is to discern and navigate the specific collaborative meetings and interventions the school coordinates, understanding that each school may label these collaborative efforts differently. Transitional Coaches should actively engage in and contribute to those meetings that align with their role, particularly in ensuring that students' behavioral and emotional needs are comprehensively addressed while respecting the boundaries of their position in the educational ecosystem.

Summer Planning Period Plans

Creating a comprehensive summer plan for a Transitional Coach involves several key activities to support students in bridging the gap between academic years, addressing behavioral and emotional needs, and setting the stage for success in the upcoming school year. Below is a detailed summer plan encompassing a review of academic and behavioral performance, goal setting, weekly telehealth sessions, preparation for the new academic year, and coordination with families and school personnel.

Summer Planning Overview for Transitional Coach

Phase 1: Review and Assessment

- Review of Grades and Behavior (Week 1)
    - Conduct a thorough review of the student's performance and behavior from the 4th grading period.
    - Analyze trends in grades and behavior to identify areas of strength and concern.

Phase 2: Goal Setting (Week 2)

- Mapping of Goals for Summer
    - If appropriate, meet with each student (and family members) to discuss the review findings.
    - Set specific, measurable, achievable, relevant, and time-bound (SMART) goals for the summer, focusing on academic performance, behavior, and emotional well-being.

Phase 3: Weekly Telehealth Sessions (Weeks 3-8)

- Implementation of Weekly Telehealth Sessions
    - Schedule weekly telehealth sessions with each student, utilizing text, email, and video calls to support, track progress, and adjust interventions as necessary.
    - Topics may include managing emotions, improving social skills, academic tutoring, and other relevant areas based on the student's needs.

Phase 4: Summer Activities and Preparation for New Academic Year (Weeks 9-12)

- Activities for Preparing the Student for the New Year
    - Engage students in activities that prepare them academically and emotionally for the new year, such as summer reading programs, math challenges, or social skills workshops.
- Coordinating Consultation Activities with Family Members

- Conduct family therapy sessions or consultations to discuss progress, address concerns, and reinforce student support strategies.
- School Coordination
    - Work closely with the school's Point of Contact (PoC) to lay the groundwork for the student's success, including class selection and room scheduling.
    - Ensure that any necessary accommodations or support services are arranged before the start of the new school year.

Phase 5: Wrap-Up and Documentation (Week 13)

- Progress Review and Documentation
    - Review the progress made toward the summer goals with each student and their family.
    - Document all activities, interventions, communications, and outcomes securely and confidentially to inform future planning and support.

Continued Coordination

- Ongoing Communication with School and Family
    - Ensure ongoing communication with the school's PoC and the students' families to facilitate a smooth transition into the new school year.
    - Provide a summary of the summer plan's outcomes and recommendations for continued support during the upcoming academic year.

Implementation Notes

- Flexibility: Be prepared to adjust the plan based on the student's progress and any emerging needs.
- Confidentiality: Maintain confidentiality and privacy in all communications and documentation.
- Collaboration: Foster a collaborative environment with students, families, and school personnel to support the student's holistic development.

This structured summer plan addresses students' multifaceted needs, ensuring they are supported academically, behaviorally, and emotionally, setting them up for success in the upcoming academic year.

[Summer Planning Period Tracker Tool]

Week of Testing Plan for Transitional Coach

Pre-Testing Preparation (1-2 Weeks Before Testing)

- Academic Review Sessions
  - Organize and conduct review sessions for key subjects to reinforce students' understanding and confidence in the material.
  - Provide resources such as study guides, practice tests, and online tutorials tailored to each student's needs.
- Stress Management Workshops
  - To help students manage test anxiety, host workshops or sessions on stress management techniques, including mindfulness, breathing exercises, and positive visualization.
- Logistical Preparations
  - Ensure students and their families know the testing schedule, locations, and necessary materials (e.g., ID, pencils, calculators).
  - Coordinate with school staff to address any accommodations or modifications needed for students with IEPs or 504 Plans.

During Testing Week

- Morning Check-Ins
  - Facilitate brief morning check-ins via text or email to offer encouragement, remind students of stress management techniques, and ensure they're prepared for the day.
- Availability for Crisis Management
  - Be readily available to address immediate concerns or emergencies, supporting students experiencing heightened anxiety or other issues.
- Coordination with School Staff
  - Maintain open lines of communication with teachers and administrators to monitor testing progress and intervene when necessary to support students' needs.

Post-Testing Activities

- Debrief Sessions
  - Schedule individual or group sessions to debrief with students about their testing experiences, discussing what went well and areas for improvement.
- Relaxation and Celebration Activities
  - Organize activities to help students relax and decompress after the testing period, acknowledging their hard work and efforts, such as a group outing or a fun workshop.
- Review of Results and Feedback
  - Once test results are available, review them with each student to celebrate successes and identify areas for future focus.
  - Provide constructive feedback and strategies to address any challenges revealed by the test results.

Documentation and Reporting

- Record-Keeping

    - Document all interactions, interventions, and observations made during the testing period securely and confidentially.
- Analysis and Planning
    - Analyze the effectiveness of the testing week plan, incorporating student feedback and outcomes to adjust future testing preparations and strategies.
- Communication with Stakeholders
    - Communicate a summary of the testing week's outcomes, student feedback, and recommendations for future test preparations to families and school personnel.

Implementation Notes

- Flexibility and Adaptability: Be prepared to adapt strategies and interventions based on students' real-time needs and feedback from school staff.
- Emotional Support: Prioritize emotional support and encouragement, recognizing the high stress that testing periods can bring to students.
- Collaboration: Foster a collaborative approach with school staff, students, and families to maintain a supportive environment throughout the testing period.

This plan aims to holistically support students through the testing week, balancing academic preparation with emotional well-being to optimize their performance and experience.

Student-Specific Week of Testing Plan Tracker Tool

Holiday Break Plan for Transitional Coach

Pre-Holiday Preparation (1 Week Before Break)

- Setting Expectations and Goals
    - Communicate with students to set expectations for the break, including academic goals, reading assignments, and personal development objectives.
    - Use platforms like Remind to send group messages outlining these goals and expectations.
- Stress Management and Well-being Resources
    - Share resources on stress management, mindfulness, and staying active during the breakthrough WhatsApp broadcasts or email newsletters.
- Academic Resources
    - Provide access to online learning resources, educational apps, and reading lists through email or text, tailored to each student's academic needs and interests.

During the Holiday Break

- Regular Check-Ins

    - Schedule regular check-ins via text or WhatsApp to monitor progress on goals, provide encouragement, and address concerns.
    - Utilize Remind for quick, group-wide motivational messages or reminders.
- Support and Resource Sharing
    - We will continue sharing educational resources, tips for managing free time effectively, and opportunities for informal learning experiences through preferred digital platforms.
- Engagement Activities
    - Organize virtual engagement activities, such as online book clubs, trivia contests, or study groups, to maintain a sense of community and encourage peer interaction.

Post-Break Re-engagement (1 Week Before Return)

- Review and Reflect
    - Invite students to share their accomplishments and experiences over the breakthrough through a structured email or WhatsApp questionnaire.
- Preparation for Return to School
    - Send reminders about the upcoming return to school, including any necessary preparations, via text and Remind.
    - Share tips for readjusting to school routines and schedules.
- Setting Goals for the New Term
    - Initiate discussions (individual or group) about goals for the coming term, leveraging the momentum from the holiday break accomplishments.

Documentation and Analysis

- Keeping Records
    - Document all communications and student feedback received during the break for future planning and reference.
- Feedback and Improvement
    - Analyze student feedback and engagement levels to refine future holiday break plans and communication strategies.

Implementation Notes

- Personalization: Tailor communications to meet students' needs and preferences, considering their academic goals and interests.
- Accessibility: Before the break begins, ensure all students can access the chosen communication platforms and provide instructions or assistance if needed.

- Balance: Encourage a balance between academic activities and personal time, recognizing the importance of rest during the break.
- Privacy and Security: Maintain confidentiality and adhere to guidelines for secure communication when using digital platforms.

This plan leverages digital communication to maintain a supportive and engaging relationship with students during holiday breaks, ensuring they remain connected, motivated, and ready for the challenges of the upcoming term.

Holiday Break Plan Tracker for Transitional Coach Tool

Program Registration Forms

Program Registration Forms: Our program is committed to ensuring a smooth and accessible registration process for all our diverse participants. To cater to different needs and preferences, we offer a variety of Program Registration Forms. Whether you prefer English or Spanish, a traditional print format, or an electronic version, our options are designed to make registration convenient for everyone. Below, you'll find the traditional print registration forms in English and Spanish, designed for double-sided printing to conserve paper. The Program also accommodates verbal consent where necessary.

Program Registration Form: English (Print Double Sided)

Program Registration Form: Spanish

E-Program Registration Form: English

E-Program Registration Form: Spanish

E-Treatment Plan Signature Page -Florida Only-

Verbal Consent

Eligibility Request

Medicaid Eligibility Request

Before providing services, a child's program approval must first be authorized. It generally takes 24 hours to receive program approval authorization or denial delivered to your email.

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Submit a Request

Training Video

Private Health Insurance/Charity Care Eligibility Request

When you find yourself in a situation where a private health insurance plan may support the program or the child may have no health insurance, submit your request using the links below. Charity Care requests can take up to 45 days to process.

Charity Care/Private Insurance Benefits Request

Charity Care Policy

Marketing Tools

Effective communication is essential for the success of the TC program. This section presents marketing tools to enhance engagement and expand outreach for our initiatives. Whether engaging directly with students, communicating with parents, or promoting the TC program more broadly, these tools are tailored to meet the program's unique needs. From detailed scripts for student engagement and parent phone calls to ready-to-print flyers and targeted messaging for school programs, each resource is crafted to ensure clarity, impact, and ease of use. Explore these tools to streamline your communication efforts and maximize participation in the TC program.

Student Engagement Script

School Program Messaging

Parent Phone Script

Program Flyer (Print and Go)

Educational and Clinical Resources

Program Curriculum

The One Circle Foundation's online curriculum is a valuable resource for enhancing mental health programming within the Transitional Coach framework. This curriculum fosters emotional resilience, interpersonal skills, and community building. By incorporating these materials, Transitional Coaches can more effectively guide individuals through their transition phases, promoting mental well-being and social connectedness. The comprehensive approach provided by the One Circle Foundation equips coaches with the tools to help individuals develop coping strategies and strengthen their support networks, both essential to successful transitions.

Access Program Curriculum Library

Clinical Auditing Guidelines

This manual is meticulously crafted to assist auditors, administrators, and mental health professionals in understanding and implementing the rigorous standards and practices required to audit effectively and document mental health services properly.

Auditing Guide

Peer Review Preparation Packet for Providers

This packet has been thoughtfully developed to guide clinicians, transitional coaches, and mental health professionals in navigating the expectations of a clinical peer review. It outlines the core practices, documentation standards, and communication strategies necessary to demonstrate clinical integrity, service fidelity, and adherence to treatment plans during audit processes. By following the guidance, providers will be well-positioned to accurately, professionally, and confidently represent their clinical work.

Preparation Packet

Order of Services

This document outlines the systematic procedures and regulatory requirements of the Student Program Documentation Life Cycle. It is designed as a comprehensive guide for managing clinical events and ensuring adherence to protocols within the therapeutic setting. The sequence of activities described herein illustrates a structured approach to client care, from initial registration through therapy sessions and plan completion.

Order of Clinical Events

Understanding Same-Day Services

This document outlines the approved combinations of behavioral health services that may be rendered to a client on the same day. It serves as a practical guide for providers to ensure compliance with billing regulations while maintaining continuity of care. The service pairings described herein support a holistic approach to treatment, enabling the effective use of multiple therapeutic modalities within a single day, when clinically appropriate.

Same Day Services

Reporting and Monitoring

Monthly Student Report Request

The Monthly Student Visit Report is the most effective tool for monitoring and reconciling individual student activities. The report will provide you with a list of students served and the corresponding service dates. Additionally, the report will indicate the payment status for those service activities as either “paid or “pending.” Provider Services will email the report to you within 48 business hours of receipt. As a special note, if you have or have had more than one program host, please submit a separate request for each Program Host.

Submit Request

Monthly EWI Submission

The Early Warning Indicators (EWI) form must be submitted monthly to ensure the students in your caseload maintain an active status. Following submission, any updates or results will be communicated via the email provided. Adhering to these guidelines is crucial, as service provision depends on timely EWI submission and compliance with network policies. Our Provider Services team is readily available to answer any questions or assist with the form.

Submit EWI Request

EWI Form

Electronic Medical Records Access and Training

TEBRA EMR

Tebra (formerly Kareo) delivers the first and only complete technology platform purpose-built to meet the needs of a coach's independent practice. This is where you document all of your patient clinical interactions.

EMR Login

Forgot Password

Training Video

TC Assist

TC Assist is your on-demand documentation assistant designed to help Transitional Coaches generate compliant, medically necessary session notes with ease. C Assist will then create a fully formatted note that meets Medicaid and managed care standards (Optum, Magellan, etc.) and is ready to copy directly into the EMR. The system guides you step-by-step, ensures objectivity and third-person phrasing, and even prompts you for progress buzzwords to keep your documentation complete and compliant.

Access TC Assist

Compensation, Supervision, and Bonuses

Understanding Compensation

This section of the TC Manual provides a detailed overview of licensee compensation procedures. It includes essential information on navigating fee schedules, understanding reimbursement policies, and using tools to ensure prompt, accurate payment disbursement. This guide also covers the process for submitting 1099 requests, ensuring compliance with financial regulations. Aimed at helping licensees manage their financial engagements effectively, this section serves as a crucial resource for understanding the organization's compensation framework.

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Fee Schedule

Reimbursement Schedule

Disbursement Date Tool

1099 Request

Understanding the Reimbursement Guidelines

Influence Bonuses

The State Influence Program Guide provides an overview of the program's structure, including stipend details, bonus levels, and student visit requirements. It also outlines essential rules and procedures for stipend requests, ensuring compliance and clarity in maximizing program benefits. This manual is your resource for navigating the program's guidelines and achieving success within the State Influence Program.

Influence Program

Release of Records and Inter-Agency Care Coordination Policy — Minor Patients in School-Based and Community Settings

Why this policy exists. Our patients are minors. When their information is shared with outside agencies without the custodian's knowledge, families find out only when a stranger calls them — and they often report it as fraud. Those reports trigger Medicaid reviews that put every provider in this network at risk. This policy exists to make sure that never happens again.

The rule. No network member may share any patient information with any external party until the network has received a written authorization, authored and signed by the patient's legal custodian on the custodian's own stationery, that meets every requirement below. This applies to every external party — other providers, schools, outside agencies, care coordinators — and applies even when HIPAA or FERPA would otherwise allow the disclosure without consent.

What the authorization must include. Every authorization must contain:

- The patient's full name and date of birth
- The specific information being authorized for release (not "all records" or "anything needed")
- The specific person or agency authorized to receive it
- The specific purpose of the disclosure
- An expiration date, not longer than 12 months out unless clinically justified
- The custodian's printed name, signature, and date

Format. The authorization must be on the custodian's own stationery, authored by the custodian, and signed and dated by the custodian. The network does not provide, supply, or draft authorization forms, and network members may not provide template language, fill-in-the-blank forms, or drafting assistance to custodians. If a custodian asks how to write an authorization, direct them to consult their own counsel or the receiving agency; do not coach them on content.

What is **not** acceptable: verbal authorization, text message authorization, authorization relayed by a third party, authorization signed by a clinician "per verbal with parent," authorization on the receiving agency's letterhead, authorization on a network form of any kind, or any document missing any element above.

How to process a request. Every authorization and every request for records goes to compliance@sbhsnetwork.com before any information is released. Compliance verifies the custodian's identity and authority, confirms the authorization is complete, and documents the disclosure. Do not release information directly, even to agencies you know and trust.

What to do when a request comes in that doesn't meet the policy. Do not release the information. Do not promise to release it later. Tell the requester: "Our network requires a written authorization authored and signed by the custodian on the custodian's own stationery, submitted to our compliance office." Then forward the request to compliance@sbhsnetwork.com and let them handle it. Do not draft the authorization, suggest wording, or fill out any form on the custodian's behalf. If the custodian cannot or will not produce a compliant authorization, no disclosure occurs.

Exceptions. This policy does not apply to: mandated child abuse or neglect reports, valid court orders or subpoenas, emergency disclosures to prevent imminent harm to the patient or others, and patient or custodian access to their own records. Each of these is handled through a separate procedure. If you are unsure whether a situation is an exception, stop and contact compliance before disclosing anything.

Examples.

Compliant: A parent writes a letter on their personal letterhead stating that Dr. Smith at Stability Counseling may receive the patient's therapy progress notes from 1/1/2026 forward, for the purpose of coordinating ongoing therapy, valid through 12/31/2026. The letter is signed and dated by the parent. It goes to compliance, compliance verifies, and records are released.

Not compliant: A parent texts "yes go ahead and talk to Amber" in response to a clinician's question, and the clinician signs an ROI form noting "per verbal with mom, confirmed by text." No information may be released.

Not compliant: The receiving agency sends its own authorization form with the parent's signature on it. The authorization must originate from the custodian, not the receiving agency. No information may be released.

Consequences of violating this policy. Violations are taken seriously because they expose the network, every other provider in it, and the families we serve. Depending on the violation, consequences include required retraining, suspension of referral privileges, removal from the network — which ends your ability to see our patients and bill through our network — and reporting to HHS, state licensing boards, the state Medicaid agency, or DCF where required by law. Breach notification obligations under federal and state law apply independently of this policy.

When in doubt, don't disclose. Contact compliance@sbhsnetwork.com before releasing any information. There is no penalty for asking.

Supervision

Supervision Letter Request section. Please fill in the necessary details below to generate your standard supervision letter. The letter will be created and sent to you upon completing your request. It is then your responsibility to forward this letter to your designated supervisor. Please note that, per state guidelines, the network cannot modify the content of the supervision letter. Ensure you provide accurate information for prompt processing:

- Transitional Coach First and Last Name
- Transitional Coach Email Address

Thank you for your prompt attention to this matter and for ensuring smooth, efficient communication with your supervisor.

Supervision Letter Request
TC Job Description Request
Work Verification
(Customize as appropriate)

Must-Have Tools

WhatsApp and Remind

WhatsApp and Remind can be versatile tools for school therapists to manage their caseloads and stay connected with their clients. Here's a short example of how it could be used effectively:

Initial Setup: Client Consent and Privacy: Before using WhatsApp, the therapist ensures they have their clients' (or their guardians' if underage) consent to communicate via this platform. They also discuss and ensure understanding of privacy settings and the limits of confidentiality in digital communication.

Daily Operations: Appointment Reminders: The therapist sends reminders the day before each session. This helps reduce no-shows and ensures clients are prepared for their sessions.

Ongoing Support: Secure Messaging for Check-ins: The therapist uses WhatsApp's end-to-end encryption to send check-in messages to clients, asking about their well-being and any pressing issues they might want to discuss in their next session. This helps maintain a supportive connection between face-to-face sessions.

Resource Sharing: Sending Informational Resources: The therapist can share links to helpful resources, such as articles, videos, or mindfulness exercises, tailored to each client's needs. This supports the client's ongoing learning and coping strategies outside therapy sessions.

Emergency Protocol: Crisis Communication: In an emergency, clients can contact the therapist for immediate support. While WhatsApp is not a substitute for emergency services, it can be a quick way for clients to notify their therapist, who can then guide them on the next steps, whether that means contacting emergency services or providing immediate crisis intervention. Privacy and Professionalism: Maintaining Boundaries: The therapist sets clear boundaries regarding communication times to balance availability with personal time. They might use features like silencing notifications outside of work hours or setting an auto-reply to inform clients when they can expect a response.

Documentation and Follow-up: Record Keeping: While direct messages on WhatsApp should be kept to a minimum for confidentiality reasons, therapists can maintain notes on themes or topics discussed in messages for follow-up in sessions, respecting privacy and ethical guidelines.

Group Support: Creating Support Groups: If appropriate and consent, the therapist can create closed WhatsApp groups for clients with similar challenges, facilitating peer support under professional supervision. These groups can be used to share experiences, explore coping strategies, and offer encouragement.

Using WhatsApp enables school therapists to enhance client support, making therapy more accessible and integrated into clients' daily lives. However, adhering to ethical guidelines, confidentiality policies, and local regulations regarding digital communication in therapeutic settings is crucial.

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ChatGPT

A Transitional Coach can use ChatGPT to enhance the process of creating therapy notes by following these steps:

Summarize Sessions: After each session, enter a conversation summary into ChatGPT, focusing on key points, therapeutic interventions, client reactions, and any assigned homework. Ensure that any personal identifiers are generalized to maintain confidentiality.

Generate Notes: Ask ChatGPT to structure these summaries into coherent therapy notes. You can request specific formats, such as SOAP (Subjective, Objective, Assessment, Plan) notes or any other format your institution prefers.

Reflective Practice: Use ChatGPT to reflect on the therapy session by asking it to generate questions or prompts that help you think about the session's effectiveness, client progress, and areas for future focus.

Plan Interventions: Provide details about the client's issues and goals, and ask ChatGPT for evidence-based suggestions for interventions, activities, or therapeutic techniques that could be helpful. This can aid in planning future sessions.

Language Polishing: Use ChatGPT to refine your notes' language for clarity, coherence, and professionalism. You can also ensure that the notes are written respectfully and that the client's dignity is maintained.

Educational Resources: For complex cases or to better understand certain conditions, ask ChatGPT for summaries or explanations of psychological theories, disorders, or treatments. This can be helpful for your professional development or to create handouts for clients and families.

Compliance Check: Ensure that ChatGPT for therapy notes adheres to your institution's privacy policies, ethical guidelines, and legal requirements regarding client confidentiality and record-keeping.

Remember, while ChatGPT can assist in creating more detailed and reflective therapy notes, reviewing and editing the generated content is essential to ensure accuracy, relevance, and compliance with confidentiality and ethical standards.

Best Practices to Remember

- Document your services daily and assign your notes correctly **(text provider services after you document your first note)**
- Never diagnose a student with a Z code; only F Codes are permitted.
- Text **(202) 740-9310** with any questions.
- Understand the Reimbursement Schedule
- Understand the Reimbursement Guidelines
- Understand the Reimbursement Process
- Resubmit the EWI request monthly. Authorization for services is renewed monthly
- Consultation services are only paid for by Medicaid.
- Follow Best Practices for documenting parent emails and text messages
- Follow Observation Best Practices

- Charity Care Committee Review and Approval Process

Exit Exam

Please be advised that all TCs must complete the TC licensing exam before receiving their claims disbursement. This requirement ensures all team members meet the program standards and are fully prepared for their roles. All answers must be answered correctly.

Take Exam