

Examples of Targeted Case Management

1. Service Coordinator meets with the parent to discuss the family's priorities for services from the school district in preparation for the child's upcoming ARD, and explains the purpose and structure of the ARD meeting, as well as the family's rights in Part B. This meets the criteria for TCM because:
 - Facilitating transition is a case management activity [40 TAC §108.405(a)(8)]
 - Activity is completed with the parent [40 TAC §108.405(b)(1)]

Note: Other activities, such as referral to the LEA and gathering documentation to send to the LEA are necessary case management activities. They must be documented in the child's record, but are not billable as TCM, since they are not completed with the parent.

2. Service Coordinator gives the parent a list of Mother's Day Out programs in her area, which was identified and documented as a need in the IFSP. They work together to develop a list of questions about how the programs serve children with communication delays that the parent can ask when she calls them. This meets the criteria for TCM because:
 - Assisting the family in identifying available resources to meet needs identified on the IFSP is a case management activity [40 TAC §108.405(a)(3)]
 - Activity is completed with the parent [40 TAC §108.405(b)(1)]

Note: Giving the parent who is already a skilled advocate for her child a list of MDO providers may be a necessary case management activity, and should be documented in the child's record, but in the absence of other activities, it does not meet the criteria for billing, as it does not take 8 or more minutes.

3. Service Coordinator accompanies a parent with an intellectual disability to the child's neurologist, to help the parent explain her concerns about the child's seizures, and to ensure the parent understands the doctor's instructions. This was identified as a need during a previous phone call with the parent, and was documented in the note about that call. This meets the criteria for TCM because:

- Coordinating with medical providers is a case management activity [40 TAC §108.405(a)(7)]
- Activity is completed with the parent [40 TAC §108.405(b)(1)]

Note: Time spent with the child and parent in the waiting room, in the absence of other activities, does not meet the criteria for TCM, and should not be billed.

4. Service Coordinator talks on the phone with a parent who calls her about his concerns that his needs more frequent PT services, documents the conversation and agrees to talk to the PT and convene a periodic review for the team to discuss whether changes to the plan are needed. This meets the criteria for TCM because:
 - Monitoring the effectiveness of services is a case management activity [40 TAC §108.405(a)(5)]
 - Facilitating evaluation of the IFSP is a case management activity [40 TAC §108.405(a)(2)]
 - Activity is completed with the parent [40 TAC §108.405(b)(1)]

Note: "Checking in" regularly month after month to see if services are being delivered per the IFSP, and to see if there are any new needs, without any rationale, does not meet the criteria for TCM. Monitoring is a TCM service, but the frequency should be individualized based on the needs of the child and family.