

Katie Beckett (TEFRA) – What to Gather Checklist

1. Medical & Therapy Documents

- ☐ **Psychological Evaluation** (age 6+) *or* **Developmental Evaluation** (under 6) - Needs to be less than 3 years old.
- ☐ **90 days of therapy notes** (OT / PT / Speech / ABA)
- ☐ **90 days of nursing notes** (if applicable)
- ☐ **12 months of hospital discharge summaries** (if applicable)
- ☐ **Diagnosis list** (create a single supplemental list - give to PCP)
- ☐ **Medication list** (name + dose + purpose; note side effects if relevant - give to PCP)

2. Cost-Effectiveness & Insurance Breakdown (optional)

(Helpful for renewals + gives PCP needed numbers.) You should be able to find this info when you log in to your private insurance website.

- ☐ Summary of **private insurance coverage**
- ☐ Deductible amounts
- ☐ Out-of-pocket max
- ☐ Co-pays or coinsurance for:
 - Therapies
 - Medications
 - Specialist visits
 - Equipment (DME)
 - Counseling
- ☐ Annual cost estimates for therapies (OT/PT/ST/ABA)
- ☐ Monthly averages for medications or supplies
- ☐ Any DME or incontinence supply costs

3. Primary Care Provider (PCP) Documents

(This is the longest step — start early)

- ☐ **Medical History**
- ☐ **Medical Order of Necessity** (Needs to list all therapies and the ideal amount per week.)

- ☐ **Plan of Care (POC)**
 - Diagnoses used
 - Treatment plan
 - Recommended therapies (frequency & duration)
 - Clinical justification
- ☐ **Medication List (sign yours or create their own)**
- ☐ **Diagnostic & Treatment Procedures list** (often part of the POC)
- ☐ **KB Forms completed by PCP:**
 - **DMA-6A** (Medical Evaluation)
 - **DMA-704** (Cost-Effectiveness form) Give insurance breakdown (#2) to PCP to assist filling out the form.
 - **DMA-706** (Level of Care Statement)
- ☐ **Any specialty notes needed** for the PCP to accurately fill out forms (*neurology, psych, developmental peds, gastro, genetics, etc.*)

4. School & Behavioral Documents *(if applicable)*

- ☐ IEP or 504 Plan
- ☐ Present Levels of Performance
- ☐ 90 days of school-based therapy notes
- ☐ Educational or psychological school evaluations

5. Parent Forms & Supporting Documents

- ☐ Two most recent pay stubs (or proof of household income)
- ☐ Proof of citizenship (birth certificate or passport)
- ☐ Child's Social Security card
- ☐ Insurance card (front + back)
- ☐ Health Insurance Questionnaire (DMA-285)
- ☐ Medicaid application
- ☐ HIPAA form
- ☐ Child's bank statements (if they have an account)
- ☐ Award letters (SSI, disability, child support) — or note "not applicable"
- ☐ HIPPP form (sent separately)
- ☐ Cover letter explaining missed/canceled therapy sessions
- ☐ Table of Contents (optional but recommended)