

North Carolina Infant-Toddler Program Insurance Information Worksheet: Instructions

- Purpose:** The **Insurance Information Worksheet** is to be used when the Children's Developmental Services Agency (CDSA) collects information on insurance plan benefits. Information collected on this form is used to gather the family's insurance and SFS information and is also used to supply this information to community providers when release of this information is authorized. The family must notify the CDSA when a change to the insurance information needs to be updated.
- Related Forms:** The insurance, consent, and SFS information reported on this form is utilized to inform the family during completion of any required consent procedures. Plan benefits may affect a family's financial obligation for the early intervention services identified on the IFSP.
- Instructions:**
- A. Child Information:**
The CDSA must complete the client information and SFS information section from information submitted by the family.
- Enter the child's full name as it appears on the insurance card.
 - Enter the child's date of birth and check the appropriate box to indicate the child's gender.
 - Enter the child and family's primary address, county of residence and contact numbers.
 - Enter the determined SFS percentage and monthly maximum cap and the effective date.
- B. Insurance Information:**
- Enter the applicable Medicaid number and the date eligible.
 - If CAROLINA ACCESS, enter primary care physician.
 - Identify if Medicaid is the primary insurance or if other funding sources are in effect.
 - Complete all applicable information on insurance policies in place.
- 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.