

North Carolina Infant-Toddler Program Procedures

NC ITP DocuSign for Program Use Procedures

Advantages of DocuSign

- DocuSign is HIPAA and FERPA compliant. No password protection is required, and DocuSign provides all encryption protections needed.
- DocuSign meets OSEP requirements for signatures.
- DocuSign allows for both initialing and full signatures.
- Parents can access and use DocuSign without installing or downloading an app.
- DocuSign allows for the sending of completed forms to the parent and provider for signatures.
- DocuSign will allow for one envelope to be sent to multiple emails in a designated order (some initial set up is required) and to capture signatures from multiple persons/agencies, as appropriate. For Example: parent, EISC and then provider.
- An electronic copy of the signed document(s) is sent to the parents and providers. This will serve as the parent's and provider's copy of the completed, signed document and/or IFSP. It is not necessary to send an additional copy via fax, mail, or email.
- Although DocuSign is an additional expense, savings on paper, ink toner, postage, time, standard office equipment, etc. may offset the expenses associated with DocuSign.
- Signing of the service order when needed to meet the 30-day time, in extenuating circumstances.

Uses of DocuSign

- Prior Written Notice and Consent for Evaluation and Assessment
- Authorization to Disclose Health Information (ROI)
- Request for Restrictions on Use and Disclosure of Health Information (if applicable)
- Financial Data Collection Form (FDC), if applicable, can be sent through DocuSign to the family along with other intake documents. The FDC should only have family members that live in the home listed on the form (no SSN or income information). The EISC should explain to the family why they are signing it and that they will be contacted by the Business Office for the SSN later. Once the completed packet is signed, the FDC form should be submitted to the CDSA Business Office. The CDSA Business Office will complete the form adding in the SSN, income information, determined SFS, and mail it to the family as usual. This will allow for this form to be included in the DocuSign envelope, keep the SSN safe, and not incur extra cost.
- Declining Early Intervention Services (if applicable)

- Documents that don't require parent signature (e.g. Parent Handbook, Notice of Rights, Meeting Invitation, "intake packet", etc.
- Initial IFSP
- Semi-Annual Review
- Annual Review
- Requested Reviews
- Assistive Technology Loan Agreement/Return/ Transfer

Multiple forms should be sent in one envelope due to cost associated with a per envelope fee. Example: all intake forms could be sent to the family within one envelope.

Using DocuSign from Initial Contacts

- The parent will be informed that the Infant-Toddler Program (ITP) is required to obtain a written or electronic signature on all appropriate forms. The parent will be informed that the ITP now has the option to obtain electronic signatures using DocuSign. With parental permission an email will be sent using DocuSign to obtain the parents' electronic signature. Documents are not official until signed by the parent.
 - Alternate methods for obtaining consent include mail, fax, scanned & emailed, drop off/pick up, etc. The date the document is signed is considered the date of parent signature. DocuSign, add "sign here tab" to the appropriate form.
- Instruct DocuSign to have the parent sign last in the email chain. Once the parent completes the signing process in DocuSign, the date of parent signature will be automatically generated by DocuSign. This date will be the plan signature date in BEES. Do not pre-fill a date in DocuSign.
- The 45-day timeline is met when the IFSP team meeting occurs and must be documented with a service log. The date of the IFSP meeting will be recorded in BEES as the Initial IFSP meeting date. The date the plan is signed by the parent through DocuSign will be recorded as the plan signature date in BEES.

The plan signature date does not have to match the Initial IFSP meeting date. Parents should be informed that a delay in receiving their signature will delay their right to timely IFSP development, as signed parental consent is required to authorize the IFSP.

- ✓ Consent for evaluation/assessment is required to proceed with eligibility determination and enrollment. Parents should be informed that a delay in receiving their signature will delay the family's right to IFSP development within the 45 days. Documentation of efforts to secure written and/or electronic signatures should be documented in the service log.

- ✓ Service Coordination is provided at the onset of the initial referral and billable upon receipt of the signed financial form. Once the financial form is signed, service coordination services can be billed retroactive to the date of the referral.
- ✓ Documentation of efforts to secure written or electronic signatures should be documented in the service log.
- In order to ensure ***informed consent*** all sections of the IFSP document must be completed in its entirety and sent, via DocuSign, with the IFSP agreement page when requesting signatures.
- Alternate methods for obtaining consent can be used, including mail, fax, scanned and emailed, drop off/pick up, etc. The date the document is signed is considered the date of parent signature.
- The 30-day timeline for Timely Services begins when the parent signs, consenting to the service being added to the IFSP. This would be the actual date of signature in DocuSign. Parents should be informed that a delay in receiving their signature will delay the start of services, as signed parental consent is required to add and/or initiate services on the IFSP.
 - ✓ Documentation of efforts to secure written or electronic signatures should be documented in the communication log or service log, depending on the total length of time on that day.
 - In order to ensure ***informed consent*** all sections of the IFSP document must be completed in its entirety and sent, via DocuSign, with the IFSP review page(s) when requesting signatures.
 - Alternate methods for obtaining consent can be used, including mail, fax, scanned and emailed, drop off/pick up, etc. The date the document is signed is considered the date of parent signature. In BEES, on the IFSP screen, this will be recorded as the IFSP Signature Date.
- IFSP Reviews are required to occur every six months. To allow for continuation of services, without interruption, IFSP reviews should be scheduled to allow sufficient time for the family to provide their written or electronic signature. This would be the actual date of signature in DocuSign. Parents should be informed that a delay in receiving their signature will delay the continuation of services, as signed parental consent is required to re-authorize the IFSP. In BEES this will be recorded as the IFSP Signature Date.
 - ✓ Documentation of efforts to secure written or electronic signatures should be documented in the communication log or service log, depending on the total length of time on that day.
 - In order to ensure ***informed consent*** all sections of the IFSP document must be completed in its entirety and sent, via DocuSign, with the IFSP review page(s) when requesting signatures.
 - Alternate methods for obtaining consent can be used, including mail, fax, scanned and emailed, drop off/pick up, etc. The date the document is signed is considered the date of parent signature. In BEES, on the IFSP screen, this will be recorded as the IFSP Signature Date.
- Transition Planning Meetings (TPM). The primary purpose of the TPM is to develop and add the transition plan to the IFSP. The TPM is required to occur at a designated time during the child’s transition process. The adding of the transition plan within the IFSP is to be documented through an IFSP review, in which parent signature is required. The transition planning meeting should be scheduled to allow sufficient time for the family to provide their written or electronic signature. The date on which the family signs in DocuSign would be considered the actual date of signature. Parents should be informed that a delay in receiving their signature may delay their right to timely transition activities, as signed parental consent is required for documents to be official. In BEES this will be recorded as the IFSP Signature Date

- ✓ Documentation of efforts to secure written or electronic signatures should be documented in the communication log or service log, depending on the total length of time on that day.
- In order to ensure ***informed consent*** all sections of the IFSP document must be completed in its entirety and sent, via DocuSign, with the IFSP review page(s) when requesting signatures.
- Alternate methods for obtaining consent can be used, including mail, fax, scanned and emailed, drop off/pick up, etc. The date the document is signed is considered the date of parent signature. In BEES, on the IFSP screen, this will be recorded as the IFSP Signature Date.
- If staff check on the IFSP screen that the IFSP meeting was also the TPM, the meeting date will be automatically entered on the Transition/Exit screen under #4 (Date of Transition Planning Meeting).

Individualized Family Service Plan

(Services Need to be defined ASAP after prepopulation!)

IFSP Information:

Previous IFSP(s):

IFSP Type	IFSP ID	IFSP Date	Signature Date
INITIAL	10392	11/28/2023	12/05/2023

1. *IFSP Meeting Date: 12/02/2025 (mm/dd/yyyy)

IFSP Delay Reason: Select IFSP Late Reason ...

IFSP Signature Date: 12/02/2025 (mm/dd/yyyy)

2.*IFSP Type: ANNUAL

Transition Planning Meeting? Yes

Transition Planning Conference? Yes

- Transition Planning Conferences (TPC). The primary purpose of the TPC is to conduct a meeting with the family, LEA representative, appropriate community agency representative, etc. to prepare the child and family for transition, discuss next steps, identify potential services, and make initial arrangements to move forward with transition to the program that is best for the child and family. The TPC is required to occur at least 90 days prior to the child’s third birthday. These meetings require a Meeting Invitation to be sent informing the family and others, as invited by the family, of the scheduled meeting.

An IFSP review page is **not** required for documenting that the transition planning conference occurred unless a change is being made to IFSP services and supports. However, if the TPC is held as part of an IFSP meeting, if staff check on the IFSP screen that the IFSP meeting was also the TPM, the meeting date will be automatically entered on the Transition/Exit screen under #6 (Transition Conference Date).

If the TPC is not held as part of an IFSP, the actual meeting date is entered in #6 (Transition Conference Date) on the Transition/Exit screen in BEES as pictured below.

Transition/Exit Information

Transition Information:

1. Child's LEA:

2. Is Child Potentially Eligible for Part B? Yes

3. Transition Process Timeline: 09/17/2025 and 03/19/2026

4. Date of Transition Planning Meeting: (mm/dd/yyyy)

5. Date of LEA/PSU Notification Sent: (mm/dd/yyyy)

6. Transition Conference Date: (mm/dd/yyyy)

7. Transition Planning Conference Participants: Parent Childcare provider Service Coordinator
 LEA Head Start/Early Start Other

8. Transition Planning Conference Meeting Note:

(2000 chars left)

Transition Planning Delay Reason:

LEA Notification Delay Reason:

TPC Delay Reasons:

- Transition Planning Meetings and Transition Planning Conferences convened together as one meeting require an IFSP Review page and parent signature, as the transition plan would not be official without a signature.

The date on which the family signs the IFSP Review page in DocuSign for the TPM would be considered the actual date of signature. In BEES this will be recorded as the IFSP Signature Date.

In these instances, staff should check that the IFSP meeting was both the TPM and TPC to ensure the meeting date populates to the Transition/Exit screen as both #4 (Date of Transition Planning Meeting) and #6 (Transition Conference Date).

Individualized Family Service Plan

(Services Need to be defined ASAP after prepopulation!)

IFSP Information:

Previous IFSP(s):

1. *IFSP Meeting Date: (mm/dd/yyyy)

IFSP Delay Reason:

IFSP Signature Date: (mm/dd/yyyy)

2. *IFSP Type:

Transition Planning Meeting? Yes

Transition Planning Conference? Yes

AND

If these boxes are not checked on the IFSP, the actual TPM and TPC meeting date must be entered in #4 (Date of Transition Planning Meeting) and #6 (Transition Conference Date) on the Transition/Exit screen in BEES as pictured below.

Transition/Exit Information

Save

Transition Information:

1. Child's LEA: Alamance-Burlington Schools

2. Is Child Potentially Eligible for Part B? Yes

3. Transition Process Timeline: 07/24/2025 and 01/24/2026

4. Date of Transition Planning Meeting: 01/20/2026 (mm/dd/yyyy)

5. Date of LEA/PSU Notification Sent: (mm/dd/yyyy)

6. Transition Conference Date: 01/20/2026 (mm/dd/yyyy)

7. Transition Planning Conference Participants: Parent Childcare provider Service Coordinator
 LEA Head Start/Early Start Other

8. Transition Planning Conference Meeting Note:
(2000 chars left)

Transition Planning Delay Reason: Select Delay Reason ...

LEA Notification Delay Reason: Select Delay Reason ...

TPC Delay Reasons: Select Delay Reason ...

- Use the date the DocuSign email summary (with all signatures) is received when documenting the release of information on the Communication Log in BEES.

Transferring or Deleting Documents in DocuSign

- For detailed instructions on transferring envelopes from one DocuSign users account to another, when staff leave the agency, please refer to the following link: <https://support.docusign.com/en/guides/ndse-admin-guide-share-envelopes> [support.docusign.com].
- Print or electronically save all signed documents for the official chart before deleting any envelopes, folders, or documents from any DocuSign account.