

Reprinted with Permission from Plan of N.J.



SERVICE COORDINATOR
HANDBOOK

Table of Contents

Introduction to PLAN/NJ, Inc	3
I. Employment Requirements	4
II. Supervision	4
III. Guidelines for Client Contact	5
A. Prior to Meeting the Client	
B. Initial Site Visits with the Client	
C. Continued Visits with the Client	
D. Guidelines for Specific Types of Visits	
1. Client Home Visit Checklist	
2. Client Medical Visit Checklist	
3. Client Visits That Include a Meal	
IV. Communication and Documentation Procedures	10
V. Billing and Reimbursement Procedures	12
A. Billable Services	
B. Travel and Expense Voucher	
C. Time Sheets/Payroll Entry	
D. Receipts	
E. Clothing and Property Log	
VI. Payroll Procedures	16
Sample Part-time SC Payroll Explanation Letter	
Blank Part-time SC Time Sheet	
VII. Contact Notes	19
A. Contact Note Format	
B. Sample Contact Note	
C. Tips for Writing Contact Notes	
D. Instructions for EMS Contact Note/Expense Entry	
VIII. Emergency Procedures	27
A. Definition of an Emergency	
B. Examples of Emergencies	
C. Emergency Procedures	
D. Post-Emergency Documentation	
IX. Ethics and Confidentiality	33
A. Health Insurance Portability and Accountability Act	
B. PLAN/NJ Confidentiality Policy	

Introduction to Planned Lifetime Assistance Network of NJ (PLAN/NJ)

The PLAN/NJ Mission is to answer the question, **“Who will care for my loved one when I am gone?”**

PLAN/NJ provides practical solutions to families and their loved ones with significant disabilities or mental illness, thus lessening the fear and anxiety that families experience when planning for the future.

We believe that people with disabilities have a right to experience the quality of life, and to receive the services, that they and their families desire.

PLAN/NJ delivers services by forming a circle of support comprised of families, social service providers, attorneys, financial advisors, and trust administrators. This enables us to deliver specific plans of action and to ensure that necessary services are delivered.

As a Service Coordinator (SC), you are essential in carrying out the mission of PLAN/NJ. Often, you are the face of PLAN/NJ to our clients. This handbook is meant to give you the information and resources you need to do your job well.

This handbook does not constitute an express or implied employment contract. Although this handbook describes the general guidelines of PLAN/NJ rules and policies, it is not binding on PLAN/NJ. PLAN/NJ reserves the right to unilaterally change, revise, or discontinue its rules and policies.

SERVICE COORDINATOR HANDBOOK

I. Employment Requirements:

1. Criminal background check – all coordinators must complete fingerprinting for a criminal background check as required by The NJ Division of Developmental Disabilities (DDD). Forms for the fingerprinting can be obtained from the Office Manager at the PLAN/NJ office.
2. Valid driver's license – all coordinators must submit a copy of their valid driver's license. In addition, a motor vehicle abstract will be requested to ensure a clean driving history. A driving record acceptable to PLAN/NJ is also required.
3. Reliable, well-maintained, properly insured automobile (updated proof of insurance must be provided to PLAN/NJ on an annual basis with minimum insurance levels established by PLAN/NJ and its insurance carrier).
4. Emergency contact information for PLAN/NJ

II. Supervision:

Mandatory staff meetings will be scheduled on a monthly basis. Telephone contact and one-on-one meetings with staff member's direct supervisor will be scheduled as needed.

Telephone calls from PLAN/NJ staff or clients must be returned within 24 hours.

Whenever a site visit is made, always sign in and out of the visitor sign in book if the organization uses a log-book.

The Director of Social Services (DSS) should be notified as soon as is prudent regarding client emergencies. However, do not delay emergency services in order to notify or obtain approval from the DSS. Respond to the emergency first.

Also available as part of the eCourse

[2020 Special Needs Trusts eConference](#)

First appeared as part of the conference materials for the
16th Annual Changes and Trends Affecting Special Needs Trusts session
"Pooled SNTs: Guidelines for Best Practices"