

# Document Request Checklist

Waiver, CCO, and Community-Based Services Consult

Please gather any documents you already have before your consult. You do not need every item to get started. If something is missing, unavailable, or confusing, we can help identify what to request next.

Client/Family:

Date:

Advocate:

Consult Type:

Document	Why we need it	Received?	Notes
<b>Notice of Decision, denial letter, reduction notice, or termination notice</b>	Shows the decision, reason, rights, and timeline.	<input type="checkbox"/>	_____
<b>Person-Centered Service Plan or Person-Centered Care Plan</b>	May contain the MCO or case manager's own data supporting need.	<input type="checkbox"/>	_____
<b>Waiver assessment, needs assessment, or priority needs assessment</b>	Shows documented support needs and eligibility or service data.	<input type="checkbox"/>	_____
<b>Current service plan, budget, or CCO budget documents</b>	Shows what is approved and what funding is available.	<input type="checkbox"/>	_____
<b>Provider notes, doctor letters, therapy notes, or medical necessity documentation</b>	Supports medical, behavioral, safety, or functional need.	<input type="checkbox"/>	_____
<b>Call logs, emails, case manager/MCO communication, and provider messages</b>	Creates a timeline and documents requests or barriers.	<input type="checkbox"/>	_____
<b>Typical day schedule from morning to bedtime</b>	Helps translate daily life into service needs and support hours.	<input type="checkbox"/>	_____
<b>Employee schedules, payroll concerns, or CCO staffing records</b>	Important when employees are not being paid or staffing is unstable.	<input type="checkbox"/>	_____
<b>School transition documents, IEP transition plan, work experience notes, or VR communication</b>	Helpful for youth and young adults moving toward adult services.	<input type="checkbox"/>	_____
<b>List of current providers, agencies contacted, waitlists, and services attempted</b>	Shows access barriers and what else may be needed.	<input type="checkbox"/>	_____

Tip: If you are unsure whether a document matters, send it anyway. It is easier to sort the puzzle pieces once they are all on the table.

