

Level 1 Engagement Checklist



Practice Name:

Date/Time:

Level of Engagement at the time of scheduling:

Steps

- Confirm meeting date & time at least one week prior
 - Via email / phone touch base
 - If not viable – re-scheduled date: _____

- Send out the agenda the week of the scheduled meeting
 - Via email / In-Person (ahead of virtual engagement or in-person engagement)
 - *Consider developing individualized packets with printed presentation slides, 1st Five brochures, 1st Five referral forms and Site Coordinator business cards/contact information*

- Materials to bring (in-person or ahead of virtual engagement) / May provide via email as well
 - *Color printed 1st Five Brochures*
 - *Initial information about the ASQ screening tool – a single copy of a 9 month ASQ screening (any month interval will do)*
 - *Copies of the 1st Five referral form*
 - *Iowa EPSDT Periodicity Schedule*
 - *Site Coordinator business cards/contact information*

*Notes/Comments for how to move this practice to the full implementation:
(Consider L1 Leveraging Language)*

