



# Recordkeeping Protocols & COE Documentation Tips

2012 ID&R Regional Training



# Submitting COEs to the ID&R Office

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- ▶ LEAs send COEs by the 5<sup>th</sup> of each month
    - ▶ Notify (email/phone) ID&R Office if no COEs for the month
  - ▶ COEs reviewed by Data Entry Specialist
  - ▶ If errors, duplicates, or questions, DES consults the ID&R Office team and/or local coordinator
    - ▶ Email subject line to LEA - “COE Question: XX County-Month, Year”
    - ▶ Child identifiable data is never sent via email
  - ▶ Data on COE entered into system
  - ▶ Forms scanned, filed electronically by district
  - ▶ Hardcopies stored in secure location
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## After the ID&R Office Contacts the District – What are the Expectations?

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- ▶ **Contact ID&R Office to...**
    - ▶ Understand our concern
    - ▶ Obtain the specific confidential data (via phone)
  - ▶ **Research situation**
    - ▶ What happened?
    - ▶ Human error?
    - ▶ Misinterpretation of regulations?
  - ▶ **Submit corrections/clarification to our office**
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# Expectations for Districts

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- ▶ **What are the consequences for not taking any action?**
    - ▶ Erroneous COE may be selected during re-interview process
    - ▶ Errors are not being addressed, corrected, and unwanted situations continue
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## What are the benefits of contacting the ID&R Office and correcting errors?

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- ▶ **Accurate records**
  - ▶ **Children recruited in proper and timely manner**
  - ▶ **High staff morale – pride in knowing work is performed appropriately**
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## When filling out a COE...

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- ▶ **Please Write Legibly** – clean, clear, understandable information is needed for effective data entry and quality control
  - ▶ **Section III - #4** - sometimes options A and B are checked off; should only be one
  - ▶ **Section III - #5** - too many qualifying activities entered; enter the main activity only
    - Comments (#8) should be used for additional qualifying work
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## When filling out a COE...

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- ▶ Discrepancy between the QAD date and the Residency Date – recruiters should use Comments (#8) to explain
  - ▶ Some re-certified COE's don't have the reviewer's signature verifying they reviewed the COE
  - ▶ If re-certification is a home visit, and a new COE is used, please have parent sign the form
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## Reminder...

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- ▶ Submit COEs (or notification of no COEs) by the 5<sup>th</sup> of each month
- ▶ Make note of address (Suite number)

ID&R Office

3750 Gunn Highway, **Suite 201**

Tampa, FL 33618

Attn: Anna Velez Negron

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