SUPPORT ATTENDEES CHECKLIST

Initial Entry of Support Attendees

CREATE PLAN
- Enter Attendee names, identify as team member, add Titles, Relationship, identify formal supports

NOTIFY ATTENDEES
- Notify attendees prior to the meeting
- Enter method and date of notification

HOLD CFT MEETING
- Sign the Sign-In sheet

UPLOAD DOCS
- Scan and upload CFT Sign-In sheet

COMPLETE PLAN
- Check CFT date in Demographics accordion of the plan against Sign-In
- Update attendees information based on Sign-In sheet
  - Note who attended or not
  - Make name corrections before submitting first plan

Copied Plan after First Entry of Support Attendees

COPY PLAN
- Review former attendee names, team member checks, Titles, Relationship, formal supports checks (copied with the new plan)
- Update any support/attendees information that has changed

NOTIFY ATTENDEES
- Notify attendees prior to the CFT meeting
- Update method and date of notification

HOLD CFT MEETING
- Sign the Sign-In sheet

UPLOAD DOCS
- Scan and upload CFT Sign-In sheet

COMPLETE PLAN
- Check CFT date in Demographics accordion of the plan against Sign-In
- Update attendees information based on Sign-In sheet
  - Note who attended or not
  - Make name corrections before submitting next plan