

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**