

DOCUMENT REQUIREMENTS WORKSHEET

Document Requirements Worksheet

One page per state you serve. Fill it in once and it becomes the rule set your intake form runs on.

State

Payer or program

Reviewed by

Date reviewed

THE THREE GATES

Is an autism diagnosis required, or does something else open the benefit?

Is an independent physician referral or written order required?

How fresh must the evaluation be, and is the clock on the diagnosis date or the last reconfirmation?

WHO MAY ESTABLISH THE DIAGNOSIS

Accepted credentials

Required instruments

Screeners accepted?

Provisional diagnosis accepted?

DOCUMENTS THAT TRAVEL WITH THE AUTHORIZATION REQUEST

- ☐ Comprehensive diagnostic evaluation
- ☐ Physician referral or written order
- ☐ Standardized instrument scoring reports — which: _____
- ☐ IEP, IFSP, or 504 plan when the child is in school
- ☐ School hour counts
- ☐ Treatment plan dated within _____ days of submission
- ☐ Other: _____

AGE AND PROGRAM LIMITS

Age range covered

Hour or dollar limits

Lifetime caps

Reauthorization interval

SOURCES CHECKED

Template language to adapt, not legal advice. Have your compliance reviewer or counsel confirm it against your state's requirements and your payer contracts before you put it in front of a family.

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Conditional Rules Worksheet

Turn the requirements above into form logic. Each row is one condition your intake form should carry.

RULES

Write each rule as a fact you already hold and what it does to the packet. If a rule cannot be written this way, it is not yet specific enough to build.

WHEN (A FACT YOU ALREADY HOLD)	THEN (WHAT IT DOES TO THE PACKET)

RECENCY CLOCKS TO TRACK

For every clinical document your form accepts, record the date on the document itself — not the date it was uploaded — and the window it has to stay inside.

Document	Window
Document	Window
Document	Window

FALLBACKS

For each required document, what happens when the family does not have it? Name the path, not the error message.
