



Module 6:

Moving with a Special Needs Family Member

I. Introduction

The Exceptional Family Member Program (EFMP) was established in 1987 by MCO 1754.4A. The EFMP assists service members in providing for the special needs of their exceptional family member before, during and after relocation required by a change of duty station. For all families, there is a remarkable amount of work involved when relocating. For those with a family member with special needs there are even more issues to consider and arrange. This module is designed to provide service members and their families with the necessary information and resources to assist in relocating with an exceptional family member. It is tailored to meet the needs of Marine Corps families with a special needs family member who are preparing for a Permanent Change of Station (PCS) move.

II. Learning Objectives

Upon completion of this module, participants will be able to do the following:

- Describe three pre-departure considerations for relocating with an exceptional family member.
- List the documentation that should be updated and hand-carried during the move.
- List two EFM tasks to be completed upon arrival at new duty station.
- Identify two resources that can assist with EFM relocation.

III. References

The following materials were used in preparation of this module:

- SECNAV Instruction 1745.5A of 8 May 2002, Exceptional Family Member Program
- MCO P1754.4A of 10 April 1997, Exceptional Family Member Program
- MCO P1700.24B Personal Services Manual
- EFM Connections at <http://www.efmconnections.org>
- National Dissemination Center for Children with Disabilities at <http://www.nichcy.org/>
- Department of Defense Education Activity at <http://www.odedodea.edu/>
- PL 105-17 the Individuals with Disabilities Education Act (IDEA) at http://www.ed.gov/offices/OSERS/Policy/IDEA/the_law.html
- STOMP Specialized Training of Military Parents at www.stompproject.org
- MCCS One Source at <http://www.mccsonesource.com>

IV. Preparation and Procedures

- **Marketing/Target Audience:** The target audience for this workshop is families with PCS orders who have an exceptional family member. As this topic is geared to the needs of a specific audience, marketing efforts should be focused on reaching EFM families. Marketing should be conducted through the Marine and Family Services EFMP coordinator, medical treatment facilities, childcare centers, key volunteers, and chaplains.
- **Module Length:** Approximately 30-40 minutes.
- **Training Considerations/Options:**
 - This module can be instructed by trained MCCS RAP staff or the Exceptional Family Member coordinator. Rap staff and the EFMP coordinator can also jointly facilitate the workshop.
 - This module is designed as a stand-alone workshop but can be presented as an addendum to the PCS Move workshop.
- **Registration:** Registration is recommended. All registrants should receive a reminder phone call or email at least three days prior to the workshop. Each registrant should be asked if they are enrolled in the EFMP. If not, they should be encouraged to begin the process.
- **Training Materials and Tools:** All handouts should be placed at each seat or handed to participants at the beginning of the workshop. It is helpful to put handouts in the order that you will be using them. A list of needed materials and tools follows.

Moving with a Special Needs Family Member Training Materials/Tools

Equipment/Materials

- Tables and chairs to accommodate all participants
- Separate resource table
- Name tents or name tags (optional)
- Pencils
- Markers
- Projector and screen (PowerPoint capable)
- PowerPoint slides
- White board or chart paper
- Sign-in sheet

Handouts (Should be available at each seat or handed to each participant upon arrival.)

- Pre-check/Post-check (At the end of this module.)
- Moving with an EFM Checklist (Page A-42)
- Program evaluation (Page A-1)
- EFMP brochure

NOTE: Use of additional or alternative handouts is at the discretion of the local RAP. Handouts specific to your own locale are encouraged.

Resource Table Materials

Materials may include multiple copies of handouts for participants to take with them or single copies of books, pamphlets, or videos for participants to look at.

- SITES booklets
- Resource materials from STOMP
- Resource materials from NICHY
- TRICARE information
- DoD Education Activity information

V. Key Terms

- Exceptional family member. An authorized family member (spouse, child, step-child, adopted child, foster child or a dependent parent) residing with the sponsor who may require special medical or educational services based upon a diagnosed physical, intellectual or emotional need. Disabilities may range from mild to severe.
- EFMP - Exceptional Family Member Program. The Exceptional Family Member Program (EFMP) is a mandatory enrollment program required for all active duty personnel with a special needs family member. The program provides assistance to those with special healthcare and/or educational needs.
- IEP - Individualized Education Plan. An IEP is a written plan for a student who receives special education and related services. It describes his/her present level of performance, annual goals, specific special education and related services the student is to receive, and duration of services. The IEP creates an opportunity for teachers, parents, school administrators, related services personnel, and students (when age appropriate) to work together to improve educational results for children with disabilities. The IEP is a legally binding document.
- IFSP - Individualized Family Service Plan. An IFSP is a written plan for infants and toddlers with disabilities and their families. The IFSP is the vehicle through which effective early intervention is implemented. It contains information about the services necessary to facilitate a child's development and enhance the family's capacity to facilitate the child's development. Through the IFSP process, family members and service providers work as a team to plan, implement, and evaluate services tailored to the family's unique concerns, priorities, and resources.

VI. Curriculum Outline

- Introduction (5 minutes)
- Administration (5 -10 minutes)
- What is the EFM program? (5 minutes)
 - Assignment Criteria (5 minutes)
 1. Categories 1-4
 2. DD Form 2792
 - EFMP impact on relocation (5 minutes)
 - Pre-departure Considerations (5 minutes)

- Arrival Tasks (5 minutes)
- Resources (5 minutes)
- Summary (5-10 minutes)

VII. Curriculum Detail

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Introduction

WELCOME participants to *Moving with a Special Needs Family Member* workshop.

TELL participants your name, position, and title. Include your experience with relocating military families as well as experience with the EFMP.

ASK participants, “How many of you are about to relocate for the first time with an exceptional family member?”

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TELL participants, “Whether this is your first move or your third or fourth, having a special needs family member can be challenging when you are leading a mobile lifestyle. Fortunately, the Marine Corps has a program designed to ensure that service members and their families have access to needed services. In this workshop we will look at the special considerations you may have when relocating. We will briefly discuss the basics of the Exceptional Family Member program, considerations upon receiving orders, recommendations upon arrival, and resources available to help you. Please feel free to ask questions and share your experiences. We can all learn from each other.”

NOTE: If the group is not too large, spend a few minutes on participant introductions. There are several ways to do this. Participants can just state their name and something about themselves such as where they are relocating to. Or participants can take a minute to talk with the person sitting next to him/her and then introduce that person to the group. If you have distributed name tags, check to see that everyone has one.

Administration

REVIEW the following information with participants:

- Breaks. As this is a short workshop, no break is necessary.

- Restrooms. Provide directions to the restrooms.
- Coffee/snacks. If you provided refreshments, offer them to participants. If you're in a classroom that does not allow food or drinks, be sure to let participants know.
- Sign-in sheet. Ask participants to complete the sign-in sheet if they did not do so upon arrival.
- Participant materials. Tell participants that the materials they received will be reviewed during the workshop.
- Resource materials. Note that resource materials are available for participants to look at after the workshop. Indicate where the materials are located.

Pre-check

ASK participants to look at the Pre-check handout.

SAY A pre and post-check will be given as we are interested in knowing not only how much you might have enjoyed the workshop but how effective we are at teaching. Please answer each question as I read it aloud and then set the paper aside. At the end of the workshop there will be a post-check and the papers will be collected. We are not asking for any identifying information.

NOTE: The correct answers to the pre-check are included here. The answers need not be given to the participants as the information will be covered during the workshop.

Moving with a Special Needs Family Member Pre-check

1. If a Marine rates at least a Category 3 status, he or she is automatically entitled to base housing. (False)
2. The monitor will consider the EFM category assignment when issuing orders. (True)
3. If a Marine rates a category 2, the family is still required to pass the overseas screening process. (True)
4. An overseas screening can be done by staff at Marine and Family Services. (False)
5. Enrollment in the EFMP allows one to select a duty station. (False)
6. One should hand carry copies of all medical and educational records when relocating. (True)
7. The IEP or IFSP from a child's current school/program will be automatically implemented at the new site. (False)
8. STOMP is an organization to assist military parents with special needs children. (True)

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What is the Exceptional Family Member Program?

SAY Per Marine Corps Order P1754.4A an exceptional family member (EFM) is a Marine Corps family member with a condition requiring special medical, medically-related, or special education services. The EFMP is designed to ensure EFM sponsors are assigned to locations where services exist to support the special needs family member. It is a mandatory enrollment program for Marine Corps personnel who have dependents requiring access to specialized medical or educational resources. The purpose of enrolling is to provide verification to your detailee that you need to be stationed in areas that can accommodate your family's needs. In order to enroll, the family member must be a dependent enrolled in DEERS and can be a child, a spouse, or a parent.

Assignment Criteria

SAY To enroll in the EFM program, the sponsor schedules an interview with the EFMP Coordinator at Marine and Family Services. A case file is opened, forms are filled out, and appointments are made for required medical or educational evaluations. Once all appointments and materials are complete, the EFMP package is then reviewed by the EFMP Coordinator and forwarded to the appropriate Central Screening Committee and Headquarters Marine Corps for processing and category assignment. The U.S. Navy Central Screening Committees (health care providers) then evaluate EFMP enrollment packages and assign a category to each exceptional family member based on the individual's needs and reflecting limitations to an assignment.

DESCRIBE the following categories. The category assigned will ensure the family members are located where appropriate military/community support services are available.

- Category 1 - EFM needs generally do not limit assignment.
- Category 2 - EFM requires pinpoint assignment overseas and within CONUS.
- Category 3 - EFM can have no overseas assignments.
- Category 4 - EFM requires location in major medical areas in CONUS.

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NOTE: The EFMP enrollment application, DD Form 2792 — Exceptional Family Member Medical and Educational Summary can be obtained at the MTF or Marine and Family Services. Sponsors who suspect they qualify for the EFM program should be encouraged to start the enrollment process as soon as possible as input from medical and educational personnel is required. Additionally, once the sponsor submits the application, the enrollment process can take up to six weeks to complete.

EFMP Impact on Relocation

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SAY Enrollment in the EFMP does not adversely affect advancement, career potential, or eligibility for special programs and assignments. Your assignment category can have an impact on relocation.

- Accompanied Assignments Overseas will not be affected if the required medical services are available at the overseas location. It is imperative that the EFM's needs be formally re-evaluated if the sponsor considers extending his/her

overseas assignment or if he/she is being considered for reassignment to another overseas location. Overseas screening is the same for all families anticipating accompanied orders overseas.

- Assignments United States. Permanent Change of Station (PCS) assignments within the Continental United States, Alaska, and Hawaii will be approved if the exceptional needs of the family member can be met in the proposed assignment area or the appropriate Director, CMC Manpower Management Division or CMC Reserve Affairs determines that the needs of the Marine Corps take precedence.
- The sponsor always has the option of accepting assignments where medical services needed by the EFM do not exist while the EFM is supported in another location.

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Pre Departure Considerations

ASK participants to look at the *Moving with an EFM Checklist*. REVIEW the following pre-departure considerations:

- Get organized! There are numerous details to attend to when relocating with a special needs family member. Be sure to keep a file with all forms, reports, and information.
- Status of enrollment. You are required to update your EFMP enrollment every two years or sooner if there is a change in the family member's condition or required services.
- Overseas Screening. If you are in receipt of overseas orders, you must schedule your overseas screening as soon as possible. Regardless of category assignment, if your family does not pass the medical overseas screening, your orders will be modified.

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- Research local resources. Call Marine and Family Services to find out your EFM point of contact at the new installation. Call or email them to ascertain information regarding resources at your new duty station. Be sure that the duty station to which you have been assigned is equipped to deal with your family member's special needs. This is particularly true if going overseas. Ask for contacts and information to help in your transition. Be sure to obtain information on schools, SSI/Medicaid, and support services.

- **Laws and Regulations.** Learns about the laws and regulations which apply at your new location. Certain laws, regulations and services do not apply in overseas locations. Qualifying criteria for special education may change from state to state as well. A school in another state is not obligated to implement your current IEP.
- **Housing.** If your family requires handicap accessible quarters or other architectural adaptation, contact the new housing office as soon as possible. Also, contact them if you need to apply for emergency housing assistance for medical reasons, to submit a hardship housing request or to apply for priority placement. A family assigned as a Category 4 may be authorized priority assignment to government housing (no priority housing overseas). This is not an automatic entitlement so ensure your enrollment is up to date and that you have sufficient justification to warrant being placed in front of other families.
- **Medical and Educational Records.** Ensure that you have copies of your records within your possession and that they are not packed with your shipment. Plan to hand-carry your Individualized Education Plan (IEP) or Individual Family Support Plan (IFSP), medical records and prescriptions.
- **Special Requirements.** Try to visualize what your family member will need while in transit. Are special accommodations needed at your place of lodging? Does he or she have enough medication to last until you are settled? Obtain prescriptions in case you need refills on the road. Pack medicines in spill proof containers. Do you need to identify hospitals accessible from your travel route in event of an emergency? Be sure to think well in advance about these issues and make arrangements now.

Arrival Tasks

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SAY Although preparation is key, there are still numerous items to arrange once you've arrived at you new location.

- **Contact the EFMP coordinator.** Let them know you've arrived and schedule an appointment to meet as soon as possible. Your EFM point of contact can provide valuable information regarding both on-base and off-base community resources.
- **Enroll your child in school.** Whether your child is school age or receiving early intervention services, contact the administration to inquire about the education placement process. Let them know that you have a current IFSP/IEP and if these are not accepted in whole, ask for a temporary placement and then immediately schedule an evaluation to determine eligibility.

- Contact SSI/Medicaid. If you are receiving a federal subsidy such as Supplemental Social Security Income (SSI) or other entitlement, send your change of address so that you can continue to receive your entitlement. You may do this in advance if you know your new address. You may have to submit additional documents to re-establish your eligibility. Rates differ from state to state.
- Enroll with TRICARE. Once enrolled at your new location, make an appointment so that your exceptional family member can get needed referrals and therapies. This can take several months, so start the process early.
- Support continuity of service. Service levels vary from state to state and region to region, and operate under different names. Do not assume that your current level of service will be replicated at your new duty station. Be prepared for a gap in service as you may be placed on a waiting list for an evaluation or for implementation of your required services. To help facilitate this, make phone calls as soon as possible and have your current IFSP/IEP in hand.

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Resources

SAY There are numerous resources available to help you. Although service delivery often feels disjointed and confusing, remember that you are not alone. There are resources specifically designed to help you navigate through your options and entitlements.

DESCRIBE the following resources:

- **SITES** at <http://www.dmdc.osd.mil/sites>. Your name and social security number will give you access to information about bases and their surrounding communities throughout the world.
- **EFMConnections** at <http://www.efmconnections.org>. Excellent resource with complete overview of the EFM program within the Department of Defense and additional resource information including common questions and points of contact.
- **National Dissemination Center for Children with Disabilities (NICHY)** at <http://www.nichcy.org>. Funded by the U.S. Department of Education, Office of Special Education Programs (OSEP), the center serves as a central source of information for children with disabilities. Provides numerous publications including resource sheets listing information, support and advocacy groups within each state.

- STOMP Specialized Training of Military Parents at www.stompproject.org is a national organization designed to help military parents of special needs children negotiate and obtain the best services possible for their children.
- TRICARE - TRICARE Handbook is available under “What’s New?” at <http://www.tricare.osd.mil/>.

NOTE: The names and phone numbers of local EFM personnel at the Marine and Family Services and MTF should be provided. Encourage participants to contact these subject matter experts for more information. Also, the local phone numbers to TRICARE Health Benefits Advisors should be provided.

Summary

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SAY As with any move, the earlier you get started in the planning process the better off you will be. Start today by contacting your EFMP Coordinator for more information. There are many resources available to help you through this challenging venture.

We’ve covered a lot of material. Before we conclude, does anyone have any questions?

SAY If there are no more questions, could you please take a few minutes and complete the post-check and also the program evaluation. You will find the post-check on the back side of the pre-check. When you’ve completed these, please hand them in. Feel free to look at the materials on the resource table.

THANK the participants for attending.

VIII. Quality Assurance Procedures

To assure accurate and current information as well as a quality presentation, the following should be completed:

- Review and update the curriculum annually. Coordinate with the local EFMP Coordinator to ensure that current policy is reflected in workshop content.
- Distribute program evaluations to participants after each workshop. Results should be tabulated and retained to measure the effectiveness of information disseminated, workshop content, and delivery of presentation.

- Evaluate pre and post-checks to determine if participants' knowledge increased.
- Observe and evaluate the program annually. This should be done by the RAP supervisor. Both program content and the presenter's effectiveness should be included in the evaluation.

IX PowerPoint Slides

A PowerPoint slide presentation can be found directly after the next section. The slides are printed three to a page with space to the right of each slide for presenter's notes. They are designed to highlight the main points of the presentation. The workshop can be presented without use of the slides.

X. Instructional Materials

Handouts:

- Pre-check/Post-check (At the end of this module.)
- Moving with an EFM Checklist (Page A-42)
- Program evaluation (Page A-1)
- EFMP brochure