Dezi's Periodic and Annual IFSP Review

March 2024

This is a self-guided professional learning opportunity that provides step-by-step guidance for a periodic and annual IFSP review using Dezi and her family as an example.

Learning Objectives

Participants will...

- Learn the steps to hold a periodic review in ACHIEVE
- Be able to determine whether a meeting is needed with the periodic review
- Learn the steps to complete an annual review in ACHIEVE
- Review the role of the service coordinator during periodic and annual reviews

This professional learning reviews the steps to: hold a periodic and annual review in ACHIEVE; determine whether a meeting is needed with the periodic review; and reviews the roles of the service coordinator during the periodic and annual reviews.

Connection to the Cross-Disciplinary EC Competencies

- Coordination and Collaboration
- Family Centered Practice
- Evidence Based Intervention
- Professionalism
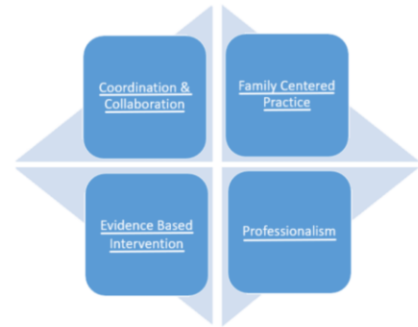
In 2019, Iowa adopted the Cross Disciplinary Early Childhood Competencies for professionals from multiple disciplines within early intervention and early childhood special education. Since then, multiple learning opportunities have been offered to faculty in higher education preparation programs from early childhood special education, occupational therapy, physical therapy, and speech-language pathology. In-service professional development trainers and coaches have also been offered learning opportunities.

This presentation connects to the following Cross-Disciplinary Competency Indicators:

From the Coordination and Collaboration Area:
Collaborates with the family, service providers, and agencies to develop, implement, and monitor an Individualized Family Service Plan (IFSP).

Family Centered Practice Area:
Collaborates with the family to identify the family's strengths, needs, concerns, and priorities.

Prepares the family to participate and contribute to the development, implementation, and evaluation of their child's IFSP or IEP, including transition options.

From the Evidence Based Intervention Area:

Systematically collects and uses data to monitor child and family progress to revise intervention plans as necessary and document intervention effectiveness.

Professionalism Area:
Uses collaborative consultation practices when working with service providers and families.

Click the link in the slides to view the Cross-Disciplinary Early Childhood Competencies: https://ecpcta.org/wp-content/uploads/sites/2810/2021/01/Cross-Disciplinary-Competency-Areas-and-Indicators_Table.pdf

Foundations of Family Guided Routines Based Intervention

Family Guided Individualized, Culturally Responsive Services & Supports

Everyday Routines, Activities, & Places

Caregiver Coaching

Embedded, Evidence-Based Instruction

Functional Participation-Based Outcomes

http://fgrbi.com/

Woods, J. (2020). *Foundations of Family Guided Routines Based Intervention* [Infographic]. FGRBI.

From the moment the evaluation and assessment process begins, you are building a foundation for early intervention services by establishing partnerships with families, and by engaging in a reciprocal process in which you learn about children and their families, and in turn, families begin to learn about early intervention. All Early ACCESS services are delivered within the family guided routines based intervention framework (FGRBI). FGRBI has four foundational components (individualized, culturally responsive services; everyday routines; functional participation-based outcomes; embedded intervention). This presentation focuses on reviewing the information gathered throughout the IFSP process to celebrate progress and adjust outcomes and services, if needed, at the time of periodic and annual reviews.

Periodic Review

First, let's review the steps for a periodic review. All of the following steps for the periodic review are outlined in the Periodic Review Flow Chart (linked in the slide).
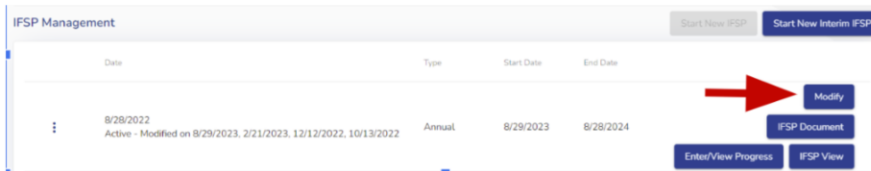
Six Month Periodic Review vs Modifying the IFSP

A review of the IFSP must be conducted every six months.

Agency	Learner Name		Referral	Initial Due	Periodic Due	Annual Due
Heartland AEA	Lines, Dezi	👤	05/05/2022	06/19/2022	09/18/2024	03/18/2025

Periodic Review[1] is due 6 months after the Initial or Annual IFSP meeting

Outcomes can be modified without a meeting.

Meetings to add or change services between 6 month reviews are completed by modifying the IFSP, NOT by starting a periodic review.

IFSP Management

	Date	Type	Start Date	End Date
⋮	8/28/2022 Active - Modified on 8/29/2023, 2/21/2023, 12/12/2022, 10/13/2022	Annual	8/29/2023	8/28/2024

Start New IFSP   Start New Interim IFSP

Modify
IFSP Document
Enter/View Progress   IFSP View

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A review of the IFSP must be conducted every six months. When doing the six month periodic review, you may or may not modify the IFSP.

If the team wants to add, revise or end an outcome, this can be done anytime between the required six month review. A review and meeting are not needed to edit outcomes. Go to **IFSP** Stepper and click *Modify*, answer *No* when asked if a meeting is needed.

If the team, including family, wants to hold a meeting to discuss the IFSP, or make changes to services between the required six month review, that can be done by modifying the IFSP any time by holding a meeting without a review. Go to **IFSP** stepper and click *Modify*, answer *Yes* when asked if a meeting is needed; then create a Periodic Meeting Notice. In these cases, the *Start Periodic Review* is **not** clicked.

Holding a Periodic Meeting to modify the IFSP earlier than the six month Periodic review due date does not change the due date of the review. For example, since Dezi's Annual IFSP meeting was held on March 18th, her Periodic Review due date is September 18th. However if the team holds a periodic meeting in May to add a service, that periodic meeting does not change the requirement to do a Periodic Review by September 18th.
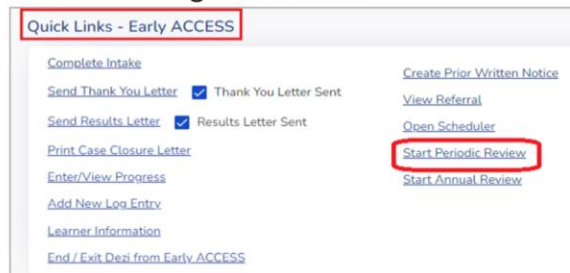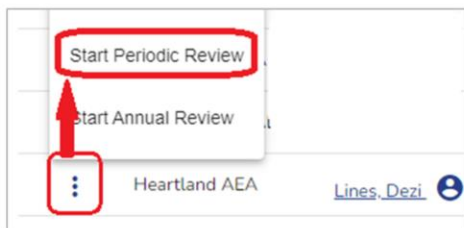
Starting a Periodic Review

SC clicks *Start Periodic Review* 2

Two ways a SC can start a Periodic Review in ACHIEVE.

What if the SC doesn't have the option to click "Start Periodic Review"?

Once started, you cannot undo or cancel the starting of a review.

Start Periodic Review

Start Annual Review

⋮ Heartland AEA Lines, Dezi

Quick Links - Early ACCESS

Complete Intake | Create Prior Written Notice
Send Thank You Letter ☑ Thank You Letter Sent | View Referral
Send Results Letter ☑ Results Letter Sent | Open Scheduler
Print Case Closure Letter | Start Periodic Review
Enter/View Progress | Start Annual Review
Add New Log Entry
Learner Information
End / Exit Dezi from Early ACCESS

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There are two ways a service coordinator can start a Periodic Review in ACHIEVE:
    1) Next to the child's name on your **Case List** click on the **Quick Access Menu**, then select *Start Periodic Review*.
    2) Click on the child's name from your **Case List** then click on *Start Periodic Review* from the **Quick Links** on the child's **Learner Management** page.

Only the service coordinator has the ability to start a periodic review. If the service coordinator does not have the option to click *Start Periodic Review*, either the child's Initial IFSP is still in draft, or a Periodic Review has already been started and not yet completed.

Once a Periodic Review has been started, there is no way to undo or cancel the starting of a review.

A periodic review shows up under IFSP Review (shown on the next slide) all other meetings or modifications will show up under IFSP management.

Periodic Review Questionnaire

Send the Periodic Review Questionnaire ~30 days prior to review due date.

If a meeting is needed, this will allow plenty of time to schedule and send the IFSP team the meeting notice.

SC sends team members, including family, the Periodic [3] Questionnaire
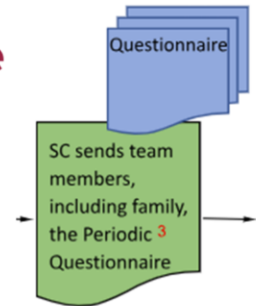
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The service coordinator can begin preparing for the Periodic Review by sending the Periodic Questionnaire; consider sending 30 days prior to the review due date. The questionnaire can be answered by providers and the family- it is for all IFSP team members. Responses from providers and the family will help determine if a meeting is needed. If a meeting is needed, this allows time to schedule the meeting and send the IFSP Team a meeting notice.

To send the Questionnaire, do the following:

     1) Go to the **IFSP** Stepper, expand the Periodic Review in the **IFSP Reviews** table.

     2) Use the **Quick Access Menu** next to **Periodic Review Actions**, and select *Send Periodic Review Questionnaire* or you can print the questionnaire by selecting *Print Periodic Review Questionnaire.*

Meeting or No Meeting

A meeting is needed when:

- There is a new concern in an area of development
- There is a change in service needed
- A transition planning meeting is needed (at least 90 days before 3rd birthday)
- Concerns with progress cannot be addressed by modifying or adding an outcome

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Based on the information gathered from the team, determine whether a meeting is needed. A meeting is needed when:

- There is a new concern in an area of development
- There is a change in service needed
- A transition planning meeting is needed (at least 90 days before 3rd birthday)
- Concerns with progress cannot be addressed by modifying or adding an outcome

Because Dezi is older than 2 years, 3 months, the Transition Stepper is visible and part of this periodic review will include a meeting with conversation about steps and supports that will help her and her family transition out of Early ACCESS.

Continued - Modification

Several ways to begin a modification

When modifying during a Periodic Review or anytime between a review, the Team does not need to update the Present Levels of Development (PLOD)

If you begin a modification, you are able to cancel that modification

Doing a modification between Periodic and Annual Reviews does not change the due date for the Periodic and Annual Reviews

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Once the Periodic Review has been started, there are several ways to begin a modification:

    1) On the child's **IFSP** Stepper, expand the Periodic Review that was started on the **IFSP Reviews** table, then use the **Quick Access Menu** next to **Periodic Review Actions** and select *Begin Modifications*.

    2) On the child's **IFSP** Stepper, expand the Periodic Review that was started on the **IFSP Reviews** table, then click the blue *Add a New Outcome* button next to the **Outcome Status** table.

    3) On the child's **IFSP** Stepper, expand the Periodic Review that was started on the **IFSP Reviews** table, then expand the **Outcomes Status** table and click on the blue *Open IFSP for Modifications* button.

    4) Click on the blue *Modify* button in the **IFSP Management** table.

When modifying a child's IFSP during a Periodic Review or anytime between a review, the IFSP team does not need to update the Present Levels of Development (PLOD) section of the IFSP.

If you begin a modification, you can cancel a modification. To cancel a modification, go to the child's **IFSP** Stepper, click the *IFSP View* button and then once in the IFSP, click the *Cancel Modification* button.

Now that the information has been entered for the Periodic Review, it must be completed. To complete the Periodic Review in ACHIEVE do the following:

1) Go to the child's **IFSP** Stepper and expand the Periodic Review that was started on the **IFSP Reviews** table.

2) Next you will click on the **Outcomes Status** heading and each outcome a child has will be listed. Click on the outcome and then select a status for each outcome. The status options are: Continue as planned, Discontinue this outcome, Outcome met and Revise this outcome.

3) Next you will select a statement describing IFSP Modifications. The two options to describe Modifications are: no concerns and no IFSP modifications needed or IFSP modifications complete.

4) Complete the **Periodic Review summary** text field.

Once required information has been completed, there is a *Complete Periodic Review* button that will turn blue. Click the button to finish the review.

Annual Review

Next, let's review the steps to complete prior to holding the annual IFSP review meeting as well as how to complete an annual review and determine whether Dezi is still eligible for Early ACCESS services.

Prior to the Annual IFSP Meeting

One goal prior to the annual IFSP meeting is to help the family reflect on services and how their child is doing within their daily routines. The more they can reflect prior to the meeting, the better equipped they will be able to advocate in the meeting.

The service coordinator starts the Annual Review by clicking the option on the child's Quick Access Menu on My Dashboard or from the Quick Links on their Learner Management page. Once an Annual Review has been started but not completed, they will access it via the IFSP Development page by clicking on the IFSP stepper from the Learner Management screen. The current IFSP will be labeled as Inactive and a new Active - Modifying Annual IFSP will be added to the IFSP Management table; the Annual Review can be accessed for review by clicking on the IFSP View button.

Once the annual review is started, the service coordinator sends the questionnaire to begin gathering input for the annual review. Selecting "Send Annual Review Questionnaire" automatically emails team members, including the child's family, inviting them to complete the questionnaire. The questionnaire asks for updated information regarding the child's progress in preparation for the Annual Review.

NOTE: Responses are optional.

Once all responses have been recorded, team members have the option to Save and Close or Complete; Save and Close will allow for future edits, while Complete submits the questionnaire and it cannot be edited.

NOTE: A pdf version of the survey can be printed by clicking on Print Annual Review Questionnaire from the Annual Review Actions Quick Access Menu.

Review/Add New Assessment Information

Add New Information:
- Family Interview
- PEACH (required if child is not receiving nutrition services)

May also review:
- On-going assessment information
- Monitoring for progress
- Service logs
- Family intervention plans
- Questionnaire responses

⋮ Annual Review Actions

Schedule Meeting

Send Annual Review Questionnaire

View / Add New Assessment Information

To review or add additional assessment information as part of the annual review process, select View/Add New Assessment Information from the Quick Access Menu. Selecting View/Add New Assessment Information will redirect you to the child's Evaluation and Assessment page. Tag appropriate developmental areas for any new assessments. When tagging developmental areas, tag multiple together to write more about the functional development rather than picking them all apart. Also remember to base your write-up on the family's priorities.

Evaluation and Assessment is where you review and update the family interview information for children continuing in Early ACCESS. Family interview sections to review and update as part of the Annual Review process include: Family Resources, Family Priorities, Family Concerns, and Routines. Interview responses can be viewed/edited by clicking on the Expand All button on the Evaluation/Assessment Details page.

Complete the PEACH for children who are not receiving nutrition services from a dietician at Child Health Specialty Clinics.

Be sure to gather input from the entire team, including the family and anyone else who spends significant time with the child. This is a list of items you may review to inform continued eligibility:

- On-going assessment information

- Monitoring for progress
- Service logs
- Family intervention plans
- Questionnaire responses

Positive Social-Emotional Skills

Description

Dezi is pretending to talk on phone, feed a baby, comfort a doll, giving hugs & kisses to her parents, giving a toy to a caregiver spontaneously, and showing a wide variety of emotions such as fear, anger, and joy. She continues to playing alone and will show an interest in what other's are doing for short periods of time. Dezi likes to help her mom, and often Delia will give Dezi items similar to what she is using. During circle time, Dezi was attempting to sing along with their morning song, often filling in the last word of the verse. With her increased communication skills, Dezi shows less frustration than she previously would. Dezi will attempt to communicate through words/word approximations first, often paired with a gesture or sometimes with a sign.

Modified on 8/1/2023

Previous: Dezi is showing some interaction with her family through smiles, gestures, and sitting on their lap. She does not yet initiate with other people that are not as familiar to her. Dezi participates in social, interactive games by smiling and laughing. Her parents shared that Dezi cries when she cannot communicate her needs. They described her as generally quiet. Dezi crawled to her child care provider for comfort when she became upset.

Present Levels of Development (PLOD)

No indicators for pediatric undernutrition based on available data. Dezi has been growing within expected standards. This tells us she is receiving the calories and protein needed for growth. Suspect she is largely receiving the vitamins/minerals needed based on reported intake. Average weight gain of 8.7 g/day from 8/1/22 to 3/22/23; she grew .9 centimeters per month during this same time period (Goal: 1-3 years old 5-8 g/day 0.8-0.9 cm/month.) BMI: 30 %ile (Z= -.53) based on CDC (girls, 2-20 Years) BMI-for-age based on BMI available as of 3/21/2023.

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Part of the annual review includes updating the Present Levels of Development (PLOD) and the Early Childhood Outcomes. The team may update the PLOD prior to the meeting and then review it during the meeting to gather input from the family and to include them in the ECO conversation.

The Present Levels of Development (PLOD) accordion is first in order on the IFSP - Modifying page. The Modify button at the top of the section allows you to update PLOD information in the IFSP Annual Review, if needed.

When the Modify button has been clicked, you may edit the existing skills and abilities by typing any changes into the provided text field; any proposed text will appear below the field in a different color along with the current documented text in black.

To modify the Comparison to Age Expectation, click on the Launch ECO Decision Tree button. The ECO Decision Tree will open in a new window, and you can complete the chart by clicking on the appropriate responses to the questions. Once the chart is completed, click on the Team Decision ECO Description accordion below the Decision Tree. The suggested description will be highlighted green and directly linked to how you answered the questions on the ECO Decision Tree.

NOTE: You can choose the suggested option or select a different one by clicking the radio button next to the team's choice. Once the team has made the ECO description decision, click the Save button. The window will close, returning you to the Annual Review. The new Comparison to Age Expectation will display in a different color below the current documented description.

As part of the Annual Review, you will be required to document the child's continued Eligibility. Based on the review of Dezi's information, including updates from her family and childcare provider, the team determined that additional information was not needed to determine that Dezi continues to be eligible for Early ACCESS. The team will discuss the information in her evaluation/assessment stepper, outcome progress, and the PLOD to show she continues to have a 25% delay. The decision that Dezi is still eligible for EA services will be discussed during the Annual Review meeting.

However, if an evaluation is needed to determine continued eligibility, a parental consent is required. A blue button will appear to Add New Consent for Early ACCESS evaluation. The team will complete the evaluation/assessment by entering information on the Evaluation/Assessment Details page.

Refer to the [Annual Eligibility Determination Decision Flowchart for Early Intervention](#), linked in the title of this slide, for more details.

Prior to the meeting, send the team, including the family, the PLOD summary and, if appropriate, the draft evaluation/assessment report. This provides the team and family time to review for accuracy and prepare questions to discuss in the annual review meeting.

During the Annual IFSP Meeting

Given that all team members, including the family, have received the summary of information ahead of time and the service coordinator has prepared the family for the meeting, all perspectives can be considered and the family is well-equipped to advocate for their child during the meeting.

Review Present Levels of Development (PLOD)

Early ACCESS Present Levels of Development

Child Dezi Lines	**Age** 31 months, 21 days	**IFSP Meeting Date** 08/01/2023
Date of Birth 01/04/2021	**Referral Date** 05/05/2022	**IFSP Type** Annual
Family Ernesto Lines	**Email** N/A	**Phone** 515-333-3212
Delia Lines	edlines@net.org	515-333-3211
Resident District Ames		**Area Education Agency** Heartland AEA
Periodic Review of IFSP 11/12/2023	**Annual IFSP Meeting** 05/10/2024	**Transition Planning Meeting** 10/06/2023

Link to full

[PLOD report](#)

Early ACCESS Service Coordinator

Every family who participates in Early ACCESS is assigned a service coordinator. The Early ACCESS service

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In the Annual IFSP meeting, review the Present Levels of Development report with the team, which was updated prior to the meeting. Ask the family for feedback on the accuracy of the report and involve them in the ECO conversation. You are required to update all three ECO areas as part of the Annual Review.

Review All Information with Family/Team

How is the plan working?

| 8/11/2022 | Mom reported that Dezi is trying to use her words when she wants a cracker or other favorite foods. | Mom and Dad would like Dezi to use words to name/label familiar items or actions related to the activity (e.g. dog, juice, ball, kick, dump, water) during routines such as book reading, snack, play and bath time in conversations with Mom and Dad each day. |

Mom and Dad would like Dezi to use words to name/l...

Service Logs

Monitoring for Progress

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After the PLOD and ECO descriptions are reviewed and updated, review all other information with the family and IFSP team. Ask the family if the information is an accurate description of what's happening right now with their child. If they weren't able to complete the questionnaire prior to the meeting, review those questions in the meeting to gather the family's input.

Review Outcomes

Outcome Status

During family mealtime, Dezi will use a spoon to feed herself a variety of meats, vegetables, and fruits so that she eats what the family eats. *

During book reading before bedtime, Dezi will respond to questions such as "where's the___" by pointing to pictures in the book or imitating easy words modeled by mom. *

Mom and Dad would like Dezi to use words to name/label familiar items or actions related to the activity (e.g. dog, juice, ball, kick, dump,

Outcome Status

During family mealtime, Dezi will use a spoon to feed herself a variety of meats, vegetables, and fruits so that she eats what the family eats. *

○ Continue as planned
○ Discontinue this outcome
○ Outcome met
○ Revise this outcome

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Finally, review the outcomes with the team. Ask the family where they see growth in the outcomes and where else they would like to see growth. For each outcome, choose the appropriate option related to continuation, completion or revision of the outcome.

When conducting an Annual Review, it is required to document the current Outcome Status for each outcome in the child's IFSP. To document the status of the outcome(s), click on the Outcome Status heading to open up the section. You will then see more accordions, one for each child and/or family outcome.

If you chose Continue as planned, nothing else will need to be done to the outcome. However, choosing any of the other options will not be reflected in the IFSP, and you will need to go to the Outcomes accordion to make the necessary modifications.

Example: Ending an Outcome

Outcomes		
Add New		
Actions	Outcome	Outcome Area(s)
👁 ⋮	During family mealtime, Dezi will use a spoon to feed herself a variety of meats, vegetables, and fruits so that she eats what the family eats.	Use of Appropriate Behaviors to Meet Needs
👁 ⋮	During book reading before bedtime, Dezi will respond to questions such as "where's the___" by pointing to pictures in the book or imitating easy words modeled by mom.	Acquisition and Use of Knowledge and Skills
👁 ⋮	Mom and Dad would like Dezi to use words to name/label familiar items or actions related to the activity (e.g. dog, juice, ball, kick, dump, water) during routines such as book reading, snack, play and bath time in conversations with Mom and Dad	Acquisition and Use of Knowledge and Skills
Add Progress Monitoring	~~up from child care, Delia will talk to her child~~	~~Families help their~~
👁	~~where she can get picture books so that she~~	~~child develop and~~
View Graphs	~~read with Dezi at home.~~	~~learn~~
Modify		
End Item		

When picking Dezi up from child care, Delia will talk to her child care provider about where she can get picture books so that she has more books to read with Dezi at home. (Ended)

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This is an example of what is displayed in ACHIEVE when an outcome is ended. Note that it is crossed out in the table and has "ended" in parentheses at the end of the outcome.

Transition Stepper

Potentially Eligible *

All relevant, available information may be used in guiding the IFSP team's consideration of the four conditions for determining if a child is potentially eligible for special education. When any one of the following conditions exist and the family approves of involving special education staff, contact special education to participate in transition planning.

| Diagnosis of Condition | Present Levels of Development | Progress and Comparison to Age Expectations | Requires Continued Intervention |

Present Levels of Development *

Are there data to suggest that Alethia is not meeting age appropriate expectations and is unique when compared to peers of the same age?

○ Yes ○ No ↺

Comments

[Previous] [Next]   [Invite Special Education]

Does the family approve of involving special education staff? *

○ Yes ○ No ↺

Because Dezi is older than 2 years, 3 months, the Transition Stepper is visible and part of this annual review will include a conversation about steps and supports that will help her and her family transition out of Early ACCESS. There are two pathways in the Early ACCESS transition process for children who are approaching three years old. Steps may include preparing the family and child for a transition to special education or other community settings and services.

As part of the transition planning process, it is required to document the child's potential eligibility for special education. Under the Potentially Eligible section, the team will consider and document any circumstances that may lead to involving special education staff by clicking through the steppers:
● Diagnosis of Condition
● Present Levels of Development
● Progress and Comparison to Age Expectations
● Requires Continued Intervention

If any one of the four areas has a documented Yes response, you will be required to record whether the family approves of involving special education staff. In this case, the team did respond "yes" to Present Levels of Development and Dezi's family is OK with involving special education staff. This conversation occurred prior to the annual meeting, which allowed for the special education staff to join the meeting.

Transition Stepper

Preparing Our Family for Transition

Dezi's family is currently interested in or has completed the following activities to prepare the family for the transition from Early ACCESS:

Activity	Person to Carry Out Activity	Projected Start Date	Date Activity Completed
Schedule a meeting with special education staff to provide information on the evaluation process.	Dee Waddell	04/10/2023	N/A
Discuss the different environments services may be provided if your child is determined eligible for special education.	Celeste Mortvedt	05/22/2023	N/A

After the service coordinator schedules a transition meeting, you can view and print the Early ACCESS Transition Plan by clicking on the Early ACCESS Transition Plan button; a draft version of the Transition Plan will open in a new window.

NOTE: If no meeting has been scheduled with transition as a purpose, clicking on the Early ACCESS Transition Plan button will result in a temporary red warning modal displaying at the bottom of the screen stating ACHIEVE could not open the output.

As a result of the transition planning meeting, the IFSP team documented the conversation about activities that will help Dezi's family prepare for the transition from Early ACCESS.

Do Meeting Roll Call

Activity

Early ACCESS Transition Planning, Annual Individualized Family Service Plan (IFSP) - Meeting

5/12/2023 9:00 AM |
Delia and Ernesto's home

Requested Participants:

Names	Agency	Role	Meeting Attendance
Ann Hagensick	Keystone AEA	Service Coordinator	In-Person Attendance
Tonya Krueger	Keystone AEA	Consultant	
Stephany Brimeyer		Licensed Dietician	
Delia Lines	NA	Family	
Celeste Mortvedt		Special Education Consultant	
Dee Waddell	Keystone AEA	Other Professional Staff	
Ernesto Lines	NA	Family	

In-Person Attendance

Written Input Provided

Video Conferencing

Did Not Attend

Other

Cancel   Print Notice of Meeting   Search / Add New Participant   Complete

Finally, at the end of the meeting, the service coordinator completes the meeting roll call. Completing it at the end of the meeting ensures that it is accurate. If it was completed at the beginning of the meeting and someone came late, they can't be added later.

On the day of a scheduled meeting (or until the roll call has been completed), you can record team member participation in the meeting from the Activity accordion by clicking on the Meeting Roll Call button.

NOTE: The Meeting Roll Call button will no longer be available if the roll call has not been completed within 10 days of the scheduled meeting date.

To change a participant's attendance status:
● Click on the pull-down under the Meeting Attendance column of the table
● Choose the appropriate descriptor

You can also add participants who attended that were not on the meeting notice during roll call.

Once each team member's attendance status has been updated, the service

coordinator can finalize the roll call by clicking the Complete button.

Once all information has been recorded for the Annual Review, you must provide an Annual Review Summary in the Annual Review Actions section of the Annual Review accordion.

When information has been entered, the Complete Annual Review button will become active. Clicking the button will gray out the Outcome Status and Eligibility responses and lock the Annual Review from future editing.

NOTE: Once you finalize the Annual Review section, you are still required to zero-out the Incomplete Data Report and finalize the IFSP modification.

Example of Review and Additional Modifications

IFSP Reviews

Periodic Review 2/20/2023

IFSP Management

Start New IFSP Start New Interim IFSP

	Date	Type	Start Date	End Date	
⋮	8/28/2022 Active - Modified on 8/29/2023, 2/21/2023, 12/12/2022, 10/13/2022	Annual	8/29/2023	8/28/2024	Modify IFSP Document Enter/View Progress IFSP View
⋮	8/28/2022 Inactive	Initial	8/22/2023	8/21/2024	IFSP Document

Items: 1 – 2 of 2

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This shows a full year of IFSP services that includes a periodic review at 6 months and additional modifications throughout the year that were completed. This shows that a modification was completed as part of the review but there were other changes made that were separate to address concerns and changes needed to reach desired outcomes. It also shows the date of the initial IFSP and then the date of the annual IFSP.

Review Responsibilities

SC plans and coordinates assessments, IFSP reviews, and transition meetings as needed.

Service Coordinator
1. Start Review in ACHIEVE
2. Send Review Questionnaire
3. Schedule meeting and send notice for annual review, determine if a meeting is needed for periodic review
   a. Meeting: New concerns; change in services; requested by team; transition
   b. No Meeting: No new concerns; no changes; no request to meet
4. Document the review discussion and decisions
5. Complete Periodic or Annual Review in ACHIEVE and finalize IFSP if modifications requiring a meeting were made

IFSP Team
1. Ensure progress monitoring and service delivery logs are up-to-date
2. Complete and submit Review Questionnaire
3. Discuss any concerns, services, or requests with Service Coordinator
4. Determine next steps to complete the review
   ○ Modify services or outcomes if appropriate
5. Complete Outcome Status of each child and/or family outcome in Review
   ○ Continue; Discontinue; Met; Revise
6. Contribute to the review and revisions of the IFSP

Review the Nov '22, Jan/May '23 SC Networking webinars for more details

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Now, let's review the role of the service coordinator and the IFSP team during periodic and annual reviews. The service coordinator: starts the reviews in ACHIEVE and sends the questionnaire to the team; they determine whether a meeting is needed (for periodic) and schedule the meeting and send notice; they document the review discussion and decisions and complete the periodic or annual review in ACHIEVE.

The rest of the team ensures that progress monitoring and service delivery logs are up-to-date; complete the review questionnaire; discuss concerns, services or requests with the service coordinator; determine service and outcome next steps with the family; complete the outcome status; and contribute to the review and revisions of the IFSP.

Summary

In this professional learning, you:

- Learned the steps to hold a periodic and annual review in ACHIEVE
- Reviewed how to determine whether a meeting is needed with the periodic review
- Reviewed the role of the service coordinator and team members during periodic and annual reviews

This professional learning reviewed: the steps to hold a periodic and annual review in ACHIEVE, how to determine whether a meeting is needed with the periodic review, and the role of the service coordinator and team members during the periodic and annual reviews.

Take a few minutes now to pause and reflect on what you have learned. Based on the information in this presentation, what is one thing that surprised you? What two questions do you have now? And what three things did you learn that you plan to incorporate into your practice? Write down your responses so you can bring them with you to your agency debrief, if applicable.

Thank you!