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# Dezi's Periodic and Annual IFSP Review

March 2024



# Learning Objectives

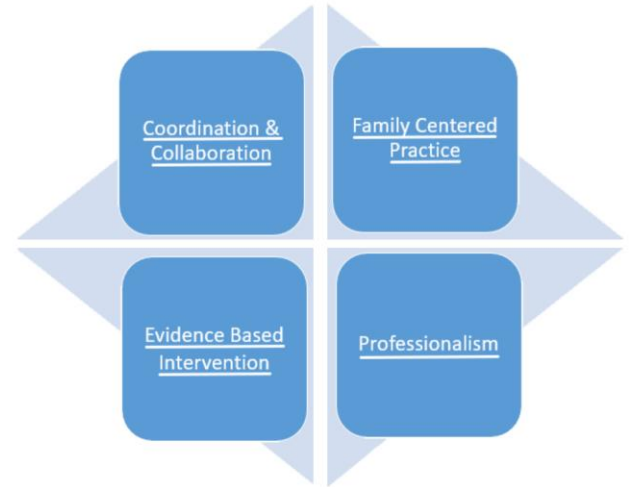
Participants will...

- 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



# Connection to the Cross-Disciplinary EC Competencies

- Coordination and Collaboration
- Family Centered Practice
- Evidence Based Intervention
- Professionalism



# Foundations of Family Guided Routines Based Intervention




<http://fgrbi.com/>



# Periodic Review

# 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	<a href="#">Lines, Dezi</a> 	05/05/2022	06/19/2022	09/18/2024	03/18/2025

Periodic Review<sup>1</sup> 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 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	 <span>Modify</span> <span>IFSP Document</span> <span>Enter/View Progress</span> <span>IFSP View</span>

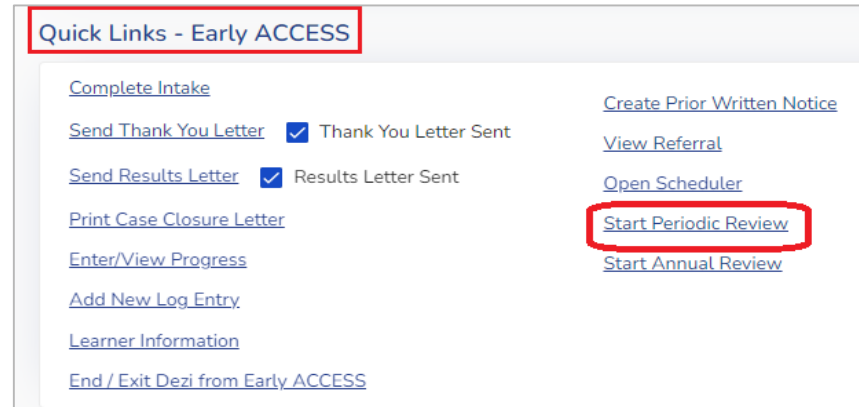
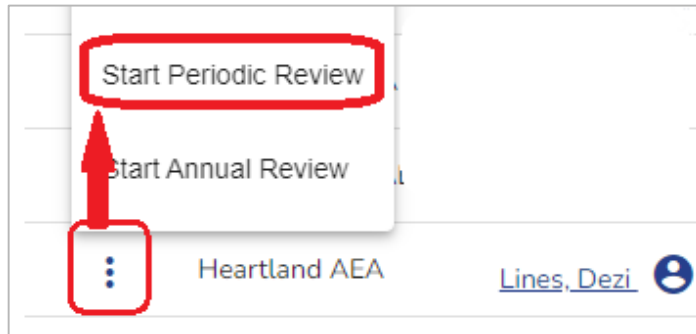
# Starting a Periodic Review

SC clicks *Start Periodic Review*<sup>2</sup>

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"?

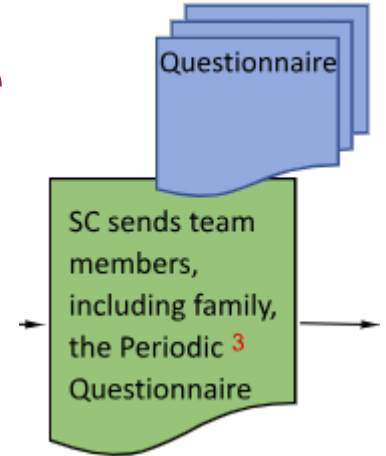
Once started, you cannot undo or cancel the starting of a review.



# 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 begins a  
Modification <sup>4</sup>  
and answers Yes  
to "Meeting  
required..."

## Meeting or No Meeting

SC begins a  
Modification <sup>4</sup>  
and answers No  
to "Meeting  
required..."

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



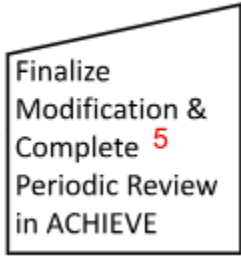
## Continued - Modification

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



# Finalize

Finalize the modification (if applicable)

Complete the Periodic Review in ACHIEVE

## Periodic Review Actions

### IFSP Modifications

- No concerns and no IFSP modifications needed
- IFSP modifications complete

### Periodic Review Summary

The meeting was held on 4/3/23 and Delia and the Developmental Specialist was in the home and the dietitian joined virtually. Information from the SLP was provided in the survey and progress monitoring notes. Dezi's progress identifying pictures using words was discussed and the team agreed that support from the Speech Language Pathologist is not needed going forward. Modifications included ending a service and updating an outcome for the SLP. The other outcomes were reviewed and the team agreed that the other services will continue as planned.

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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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.

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

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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.

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

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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.

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





# Annual Review



# Prior to the Annual IFSP Meeting

## Learner Management - Dezi Lines

Name: Dezi Lines

DOB: 01/04/2021

### Parent Info:

Ernesto Lines (515) 222-2222 (W)

(515) 333-3212 (C)

Delia Lines (515) 333-3211 (C)



Learner Dashboard



Family Contact



Documents

Service Coordinator: Dee Waddell

### Quick Links - Early ACCESS

[Update Intake](#)

[Send Thank You Letter](#)  Thank You Letter Sent

[Send Results Letter](#)  Results Letter Sent

[Enter/View Progress](#)

[Add New Log Entry](#)

[Learner Information](#)

[End / Exit Dezi from Early ACCESS](#)

[Create Prior Written Notice](#)

[View Referral](#)

[Open Scheduler](#)

[Start Periodic Review](#)

[Start Annual Review](#)

# Start Annual Review

## Annual Review Actions

Schedule Meeting

Send Annual Review Questionnaire

View / Add New Assessment Information

Print Annual Review Questionnaire

# Send Questionnaire

Do you have any new concerns about the development of Dezi that you would like to discuss with the Early ACCESS IFSP team?

Yes  No

Additional Information

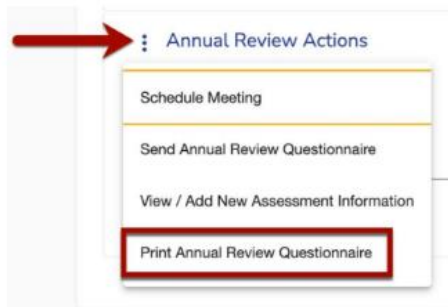
Do you think the right supports are in place for Dezi to continue making progress?

Yes  No

Additional Information

Would you like the services to continue as currently written in the IFSP for Dezi?

Yes  No



Annual Review 4/28/2023

Questionnaire Results

Outcome Status

Eligibility

⋮ Annual Review Actions

Schedule Meeting

Send Annual Review Questionnaire

View / Add New Assessment Information

Print Annual Review Questionnaire

# 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







# Update the PLOD

## 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.

# Continued Eligibility

Overview Evaluation/Assessment Details Eligibility Decision

Continued Eligibility Decision

Based on the review of existing information by the IFSP Team, is an evaluation needed to determine if Dezi continues to be eligible for Early ACCESS?

Yes  No ↺

Does Dezi continues to be eligible for Early ACCESS?

Yes  No ↺

Evaluation is not needed

Based on the review of existing information by the IFSP Team, is an evaluation needed to determine if Dezi continues to be eligible for Early ACCESS?

Yes  No ↺ **Evaluation is needed to determine continued eligibility.**

Parental consent is required if an evaluation is needed to determine continued eligibility.

Add New Consent for Early ACCESS Evaluation



# During the Annual IFSP Meeting

# Review Present Levels of Development (PLOD)

## Early ACCESS Present Levels of Development

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

# 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.



Service Logs

Monitoring for Progress



# 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



# 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
 	<del>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.</del>	<del>Families help their child develop and learn</del>
		

- Add Progress Monitoring
- View Graphs
- 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)

# 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 ↻





# 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

# 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	In-Person Attendance
Stephany Brimeyer		Licensed Dietician	Written Input Provided
Delia Lines	NA	Family	Video Conferencing
Celeste Mortvedt		Special Education Consultant	Did Not Attend
Dee Waddell	Keystone AEA	Other Professional Staff	Other
Ernesto Lines	NA	Family	

# Clear IDR & Complete Annual Review

### Eligibility

Review evaluation and assessment data to determine and document continued eligibility.

[Review Evaluation and Assessment Data](#)

### Annual Review Actions

**Annual Review Summary**  
The team met to review outcomes and progress, and discuss Dezi's transition out of Early ACCESS. At this time, Delia and Ernesto would like to continue working on the outcomes to support Dezi's communication and play skills. They want to continue with the current visit schedule. They have started thinking about Dezi's preschool experiences and options. They are very interested in Head Start preschool and wondered if they would qualify due to their income. If not, Dezi will continue at her high-quality child care setting with her family child care provider.

[Complete Annual Review](#)

### Incomplete Data Report

3 Notices

Incomplete Data

<a href="#">Resolve</a>	A PWN must be associated with this IFSP.
<a href="#">Resolve</a>	Consent for Early ACCESS Services required.
<a href="#">Resolve</a>	Finalize the Evaluation / Assessment.

Items: 1 – 3 of 3

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

# 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	<span>Modify</span> <span>IFSP Document</span> <span>Enter/View Progress</span> <span>IFSP View</span>
⋮	8/28/2022 Inactive	Initial	8/22/2023	8/21/2024	<span>IFSP Document</span>

Items: 1 - 2 of 2



# 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



# 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



## Pause and Reflect

1

**One** thing that surprised you

2

**Two** questions that you have now

3

**Three** things you will incorporate into your practice



**Thank you!**