

## **Periodic Review and Annual Individualized Family Service Plan (IFSP) Meeting Guidance**

### **Periodic Review**

A periodic review is to determine progress towards achieving the outcomes in the IFSP and whether modification or revision of the results, outcomes, or early intervention services in the IFSP is necessary.

#### **Periodic Review requirements:**

- a. Required to be conducted every six months, or more frequently if conditions warrant, or if the family requests a review.
- b. Required participants:
  1. Parent;
  2. Advocate or person outside the family, if the parent requests;
  3. Other family members, if the parent requests; and
  4. Service coordinator.
- c. If conditions warrant, provisions must be made for the participation of person(s) directly involved in conducting the evaluation and/or assessments and service providers.
- d. When conditions warrant participation by the person(s) directly involved in conducting evaluations and/or assessments and this person(s) is unable to attend a meeting, arrangements must be made for the person's involvement through other means, including one of the following: participation via conference call, having a knowledgeable representative attend the meeting, making pertinent records available at the meeting.
- e. Ensure accessibility and convenience for the parents.
- f. Periodic reviews can be carried out by a meeting or via another means that is acceptable to the parents and other participants.

#### **Preparing for a Periodic Review:**

**When there are no anticipated changes:** As the IFSP Team is prepping for the periodic review and **no changes** are anticipated in services and/or outcomes, proceed to the periodic review. This could occur through a home visit, face-to-face meeting or through other means acceptable to the parents or other participants.

When changes in services and/or outcomes arise while conducting a periodic review with the family, there are two options:

1. Schedule an Annual IFSP meeting for a later date; or
2. If the requirements for an Annual IFSP meeting (see Annual IFSP Meeting section) are met, this meeting can proceed as an Annual IFSP meeting.

Discuss with the parents and ensure the needed IFSP Team members and additional participants are invited or already present (or represented in the case of evaluator or assessor) to change or modify services and/or outcomes.

**When preparing for the periodic review and it is anticipated that changes are needed to services and/or outcomes on the IFSP:** If service providers and/or the service coordinator anticipates changes are needed, then the team should prepare and hold an Annual IFSP meeting instead of a periodic review.

Progress toward outcomes must be documented at least every six months. This may be done either at a periodic review or an Annual IFSP meeting.

### **Annual IFSP Meeting**

The Annual IFSP meeting is conducted to evaluate and revise the IFSP as appropriate for a child and the child's family.

#### **Annual IFSP meeting requirements:**

- a. Required to be conducted once a year, or more frequently if conditions warrant.
- b. Written notice of the Annual IFSP meeting provided to the parents.
- c. Must include input from a multidisciplinary team which is two or more individuals from separate disciplines or professions; one of these individuals must be the service coordinator.
- d. Required participants:
  1. Parent;
  2. Advocate or person outside the family, if the parent requests;
  3. Other family members, if the parent requests;
  4. Service coordinator;
  5. Service providers, as appropriate; and
  6. Person(s) directly involved in conducting the evaluation and/or assessments.
- e. Ensure accessibility and convenience for the parents.
- f. Needs to be held as a meeting.

If the person(s) directly involved in conducting evaluations and/or assessments is unable to attend a meeting, arrangements must be made for the person's involvement through other means, including one of the following: participating via conference call, having a knowledgeable representative attend the meeting, making pertinent records available at the meeting.

#### **Evaluating the IFSP:**

- Demographic information should be verified and updated.
- With approval of the parents, the family information regarding resources, priorities, and concerns should also be reviewed and updated.
- The child's present level of development must be reviewed and updated based upon:
  - Any recent evaluation, if completed;
  - Child assessment tool or child anchoring tool, if completed;
  - Available assessment information;
  - Vision, hearing, and health status, as appropriate;
  - Professional observations; and
  - Parent input.

There is not a requirement for a new child evaluation to be done at the time of the Annual IFSP meeting unless there is a suspicion the child no longer has a qualifying delay based on parent input and ongoing assessment. If determining whether a child continues to be eligible, an evaluation must be conducted. An evaluation tool will guide the decision regarding whether the child still meets a 20 percent delay and continues to be eligible for *Early On*. All requirements for completing an evaluation will apply under this circumstance.

**Reviewing and updating present level of development:**

Developmental growth for infants and toddlers can be significant in just a few months; therefore, present levels of development from one Annual IFSP cannot be carried over to another Annual IFSP without review.

The present level of development section of the IFSP provides a picture of how the child's current abilities and challenges in all areas of development affect his/her ability to participate in family and community life. The IFSP Team should briefly summarize the child's functional skills in each developmental area by listing what they know about the child's strengths and needs demonstrated through everyday routines and activities.

It is an *Early On* best practice to not duplicate collection of existing information. Information that has been collected within the past three months for a child under 18 months or information collected within the past six months for a child 18 months or older should be used in this review.

Examples of functional skills may include:

- Maggie is able to finger feed herself Cheerios;
- Brian crawls across the room to obtain a toy of interest to him;
- Paige points her finger to indicate which snack she would prefer; or
- Savona loves the cash register toy, but gets frustrated when she can't get the coin in the slot.

Tools that could be used to assist in obtaining information on a child's functional skills include:

[Colorado Larimer County Age Anchoring Resources](#)

[Maryland's Part C Age-Anchored Early Learning](#)

[MEISR – COSF Tool](#)

[North Dakota Early Childhood Outcomes Process Age Expectation Developmental Milestones - Quick Reference](#)

[Rhode Island Early Intervention Child Outcomes Guidance Document by Age](#)

While a standard deviation, percent delay or age range is needed for eligibility determination under developmental delay, these are not indicators of present level of development. Evaluation tools are often limited in the functional information they provide to help determine the present level of development.

Vision, hearing, and health status are reviewed and revised as appropriate.

## **Related questions and answers:**

### ***What is required if the parent proposes adding a service at the periodic review and it is decided the service isn't necessary?***

An Annual IFSP is not required and the parent would be given Prior Written Notice (PWN) regarding the decision.

### ***What changes can happen without holding an Annual IFSP?***

The following changes can be made to a child's record at any time, without amending the IFSP:

- Demographics;
- Name changes of child or parent;
- Address change;
- Service Coordinator - parents must be notified of this change; or
- Payor - because Michigan has no fee for service to the parent the payor doesn't directly impact the parent.

These changes would also need to be documented on the next Annual IFSP form.

### ***Do you need to hold an Annual IFSP meeting when one of multiple outcomes (child or family) has been met?***

You would continue to work on the other IFSP outcomes. If all outcomes have been met, you would need to hold an Annual IFSP meeting to establish new outcomes.

### ***Does the transition plan have to be documented at an Initial/Annual IFSP meeting?***

A transition plan must be part of the content of an IFSP and would need to be written at either an Initial IFSP meeting (if within the transition window) or an Annual IFSP meeting.