



DEPARTMENT OF ECONOMIC SECURITY

Your Partner For A Stronger Arizona



AzEIP Programmatic Meeting - Review of an IFSP

July 25, 2023

Revised August 16, 2023

IFSP Reviews

- ★ IFSPs should be interactive and engaging with each IFSP being unique in capturing the resources, priorities and concerns of the child and their family.
- ★ The IFSP outlines a purpose and course of action to work towards wanted and/or desired outcomes.

Updating an IFSP

Who?

What?

Where?

When?

How?

Who should attend an IFSP review meeting?

- Parent(s)
- Other family members, as requested by the parent
- An advocate or person outside the family, if requested by the parent
- Service Coordinator
- All active IFSP team members providing services to the child and family

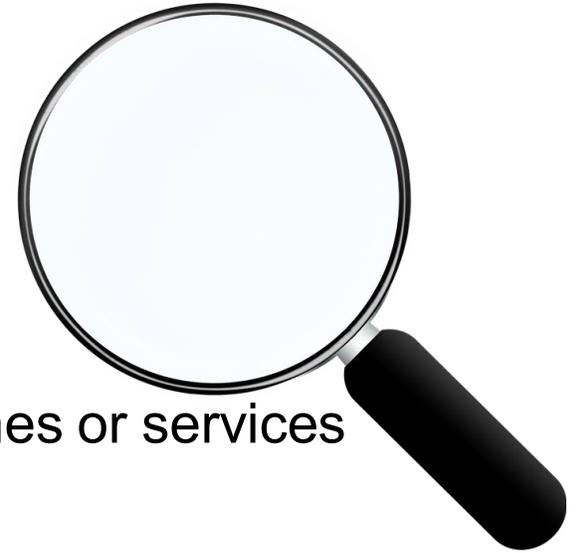
What is reviewed during an IFSP Update?

At every update, all pages of the previous IFSP are reviewed

1. IFSP Cover Page
2. Child and Family (Demographic) page
3. Child and Family Assessment pages
4. Child Indicators Summary pages*
5. Outcome(s) for Child and Family pages
6. Transition Plan pages
7. Services Needed to Make Progress Towards Outcomes page
8. Payment Arrangements for Services page
9. Informed Consent by Parent(s) for Services page
10. IFSP Team page

*Required every six months

When is an IFSP required to be reviewed?



- At a minimum of every 6 months
- If the parent or other IFSP team member requests a change in outcomes or services
- Transition Planning Meeting
- Transition Conference Meeting
- In accordance with DDD policy and procedure if child is eligible for DDD under the Targeted Service Coordination (TSC) or Arizona Long Term Care System (ALTCS)

When should an IFSP review meeting be conducted?

In the family's home with all team members present unless the family requests otherwise.



How should the IFSP document be organized?

- The cover page from the Initial or Annual IFSP remains the first page of the document
- All addendums/reviews should be included in chronological order oldest to newest behind the Initial/Annual IFSP
- Addendum pages cannot stand alone and are incomplete without the full IFSP
- All pages are kept in the IFSP even if they are blank.

Remember When Updating the IFSP

Addressing the needs of the family in the IFSP process is crucial and should be determined in a **collaborative manner** with the **full agreement** and **participation** of the parent.

- Team based early intervention and coaching will look different for every child, family, and service provider.
- When a family does not believe the IFSP services to be effective, the team, including the family, the family must be offered the opportunity to meet to review the IFSP.

Service Coordinator Responsibilities

- Before the IFSP
 - During the IFSP
 - After the IFSP

Service Coordinator Responsibilities BEFORE the Meeting

- Prior to the IFSP, discuss with the family
 - Purpose of the meeting
 - Preferred language for the meeting
 - The Child and Family Assessment Guide for Families (GCI-1088A)
 - Inquire if there are other participants they would like to have attend
- Schedule the IFSP
 - At a time and place convenient for family
 - In coordination with the team so that all members are able to attend
- Send the IFSP Meeting Notification (GCI-1044A)
 - To all participants
 - Early enough to ensure all participants are able to attend
- As applicable
 - Discuss at team meeting
 - Obtain written reports from team members not able to attend
 - Arrange for a translator

Service Coordinator Responsibilities DURING the Meeting

Facilitate active conversation between team members to

- Review and document any revisions and/or updates to
 - Child's demographic and health information
 - Family's daily routines and activities since the last IFSP
 - Resources, priorities, and concerns
 - Child Indicators Summary
 - Transition
- Examine outcomes to discuss and document
 - Progress
 - Revisions
 - Completion
 - New Outcomes
- Identify services needed to make progress
- Confirm the parent is in agreement with identified services

Service Coordinator Responsibilities DURING the Meeting (Continued)

- Review with the family
 - Child and Family Rights in AzEIP including dispute resolution options
 - Family's Guide to Funding
- Obtain consents including but not limited to the Consent to Bill Health Insurance Form
- Schedule the next SC visit with the family

Service Coordinator Responsibilities AFTER the Meeting

- Update I-TEAMS
- Complete AHCCCS Member Service Request as applicable within 2 business days
- Send complete copy of IFSP as soon as possible but no later than 10 calendar days to
 - All IFSP team members
 - Individuals identified by the family
- Confirm planned service dates have been met

IFSP Service Provider Responsibilities

- Before the IFSP
 - During the IFSP
 - After the IFSP

IFSP Service Provider Responsibilities BEFORE the Meeting

- Review prior documentation
 - IFSP
 - Contact Logs
 - Quarterly Progress Reports
 - Team Meeting Minutes
- Discuss at team meeting as applicable
- If unable to attend, provide service coordinator with a
 - Written report that includes progress and suggestions
 - Proposed planned start date

IFSP Service Provider Responsibilities DURING the Meeting

- Active listener and participant
- Ask reflective questions
- Provide information
- Assist family in the completion of the IFSP
 - Resources, priorities and concerns
 - Strategies/outcomes
 - Services
 - Planned Start Date

IFSP Service Provider Responsibilities AFTER the Meeting

- Confirm receipt of IFSP prior to starting services
- Plan for upcoming visit
- Complete visits as identified on the IFSP
- Provide documentation of visits to the service coordinator

The IFSP Team's Responsibilities

The Family, Service Coordinator and Service Providers collaborate to

- Share Information
- Discuss priorities and concerns
- Update child and family outcomes and strategies
- Review effectiveness of current services
- Identify updates/changes needed to current services

Documenting Services on the IFSP

The services identified on the IFSP must be specific to the child and family's unique needs.

Service Coordination

- Planned Start Date is the date of the IFSP
- Service Delivery units include the IFSP

Team Lead, Joint Visits and Non Team Lead

- Planned Start date should be as soon as possible after the IFSP meeting and in a manner that best supports the IFSP Outcome and recognizes the family's priorities and schedules.
- Service Delivery units do not include the IFSP



IFSP Services Pages



Examples of IFSP Services Page

GCI-1021G FORFF (4-22)
(IFSP Packet - Page 10 of 10)

ARIZONA DEPARTMENT OF ECONOMIC SECURITY
Arizona Early Intervention Program (AzEIP)

IFSP Type: Review
 IFSP Date: 07/25/2023

INDIVIDUALIZED FAMILY SERVICE PLAN SERVICES NEEDED TO MAKE PROGRESS TOWARDS OUTCOMES

Child's Name (First, M.I., Last): Roy Rogers Date of Birth: 01/01/2022

Outcome No.	Early Intervention Service	*Intensity	Frequency		Service Setting H = Home C = Community O = Other (If other, complete the justification below)	Method TL = Team Lead JV = Joint Visits TC = Team Conferencing NTL = Non Team Lead	Duration	
			No. of sessions	No. of minutes per session			Planned Start Date	Planned End Date
1	Service Coordination	I	2	30	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/25/23	09/01/23
1	Occupational Therapy	I	5	45	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	TL	08/02/23	09/01/23
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			

Select ONLY one Primary Service Setting: H C O
(Primary Setting is the setting in which the infant or toddler receives the most hours of an early intervention service.)

*Intensity: I = Individual UN = Multiple eligible children (2) UP = Multiple eligible children (3 or more)

Roy is due for his annual IFSP in September.

The SC has 2 sessions identified. One for today's IFSP review and a second visit for 8/3/23 after the OT completes their visit.

Examples of IFSP Services Page 2

GCI-1021G FORFF (4-22)
(IFSP Packet - Page 16 of 19)

ARIZONA DEPARTMENT OF ECONOMIC SECURITY
Arizona Early Intervention Program (AZEIP)

IFSP Type: 6 mth Review

IFSP Date: 07/01/2023

INDIVIDUALIZED FAMILY SERVICE PLAN SERVICES NEEDED TO MAKE PROGRESS TOWARDS OUTCOMES

Child's Name (First, M.I., Last): Bandit Heeler Date of Birth: 05/09/2021

Outcome No.	Early Intervention Service	*Intensity	Frequency		Service Setting H = Home C = Community O = Other (If other, complete the justification below)	Method TL = Team Lead JV = Joint Visits TC = Team Conferencing NTL = Non Team Lead	Duration	
			No. of sessions	No. of minutes per session			Planned Start Date	Planned End Date
1,2,3	Service Coordination	I	6	45	<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/01/23	12/27/23
1,2,3	Special Instruction	I	24	75	<input type="checkbox"/> H <input checked="" type="checkbox"/> C <input type="checkbox"/> O	TL	07/03/23	12/27/23
1,2	Vision Services	I	12	60	<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	JV	07/17/23	12/27/23
2,3	Family Training & Counseling	I	18	75	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	08/15/23	12/27/23
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			

Select ONLY one Primary Service Setting: H C O

(Primary Setting is the setting in which the infant or toddler receives the most hours of an early intervention service.)

*Intensity: I = Individual UN = Multiple eligible children (2) UP = Multiple eligible children (3 or more)

Bandit is in the process of obtaining a new Cochlear Baha System.

They have asked the team to wait to start Family Training and Counseling until their appointment to receive the device.

The family has also requested that their hearing services happen independent from their other services.

Examples of IFSP Services Page 3

GCI-1021G FORFF (4-22)
(IFSP Packet - Page 16 of 19)

ARIZONA DEPARTMENT OF ECONOMIC SECURITY
Arizona Early Intervention Program (AzEIP)

IFSP Type: Review

IFSP Date: 07/25/2023

INDIVIDUALIZED FAMILY SERVICE PLAN SERVICES NEEDED TO MAKE PROGRESS TOWARDS OUTCOMES

Child's Name (First, M.I., Last): Tony Tiger

Date of Birth: 06/01/2021

Outcome No.	Early Intervention Service	*Intensity	Frequency		Service Setting H = Home C = Community O = Other (If other, complete the justification below)	Method TL = Team Lead JV = Joint Visits TC = Team Conferencing NTL = Non Team Lead	Duration	
			No. of sessions	No. of minutes per session			Planned Start Date	Planned End Date
1,2,3,4	Service Coordination	I	6	60	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/25/23	01/19/24
1,2,3	Physical Therapy	I	18	60	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	TL	08/02/23	01/19/24
3	Speech Therapy	I	4	60	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	JV	08/09/23	01/19/24
4	Social Work	I	2	90	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/26/23	01/19/24
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			

Select ONLY one Primary Service Setting: H C O

(Primary Setting is the setting in which the infant or toddler receives the most hours of an early intervention service.)

*Intensity: I = Individual UN = Multiple eligible children (2) UP = Multiple eligible children (3 or more)

The team decided that social work would be provided individually with the family without the team lead present.

The team created a plan for the social worker to provide updates at team meetings to which the family was invited to coach the team.

Examples of IFSP Services Page 4

GCI-1021G FORFF (4-22)
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ARIZONA DEPARTMENT OF ECONOMIC SECURITY
Arizona Early Intervention Program (AZEIP)

IFSP Type: Review

IFSP Date: 07/25/2023

INDIVIDUALIZED FAMILY SERVICE PLAN SERVICES NEEDED TO MAKE PROGRESS TOWARDS OUTCOMES

Child's Name (First, M.I., Last): Jon Snow Date of Birth: 02/15/2022

Outcome No.	Early Intervention Service	*Intensity	Frequency		Service Setting H = Home C = Community O = Other (If other, complete the justification below)	Method TL = Team Lead JV = Joint Visits TC = Team Conferencing NTL = Non Team Lead	Duration	
			No. of sessions	No. of minutes per session			Planned Start Date	Planned End Date
1,2	Service Coordination	UN	6	45	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/25/23	01/19/24
1,2	Special Instruction	UN	18	60	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	TL	08/02/23	01/19/24
2	Physical Therapy	UN	7	60	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	JV	08/16/23	01/19/24
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			

Select ONLY one Primary Service Setting: H C O
(Primary Setting is the setting in which the infant or toddler receives the most hours of an early intervention service.)
*Intensity: I = Individual UN = Multiple eligible children (2) UP = Multiple eligible children (3 or more)

Jon and his sister Joannie are receiving AzEIP services.

The family was offered their choice of having the sibling's services occur at the same time or separately and they chose to have them at the same time.

The intensity of the services are identified as UN for Multiple Children.

Examples of IFSP Services Page 5

GCI-1021G FORFF (4-22)
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ARIZONA DEPARTMENT OF ECONOMIC SECURITY
Arizona Early Intervention Program (AzEIP)

IFSP Type: Review
 IFSP Date: 07/25/2023

INDIVIDUALIZED FAMILY SERVICE PLAN SERVICES NEEDED TO MAKE PROGRESS TOWARDS OUTCOMES

Child's Name (First, M.I., Last): Joannie Snow Date of Birth: 02/15/2022

Outcome No.	Early Intervention Service	*Intensity	Frequency		Service Setting H = Home C = Community O = Other (If other, complete the justification below)	Method TL = Team Lead JV = Joint Visits TC = Team Conferencing NTL = Non Team Lead	Duration	
			No. of sessions	No. of minutes per session			Planned Start Date	Planned End Date
1,2,3	Service Coordination	UN	6	45	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/25/23	01/19/24
1,2	Special Instruction	UN	18	60	<input checked="" type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	TL	08/02/23	01/19/24
3	Speech Therapy	I	4	30	<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	NTL	07/26/23	01/19/24
2	Physical Therapy	UN	7	60	<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O	JV	08/16/23	01/19/24
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
	I				<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			
					<input type="checkbox"/> H <input type="checkbox"/> C <input type="checkbox"/> O			

Select ONLY one Primary Service Setting: H C O
(Primary Setting is the setting in which the infant or toddler receives the most hours of an early intervention service.)
*Intensity: I = Individual UN = Multiple eligible children (2) UP = Multiple eligible children (3 or more)

Joannie has issue with at mealtime with swallowing her food without choking.

Joannie is receiving feeding therapy at private clinic.

The family has requested assistance transferring what they have learned at the clinic into the home.

The family has specifically requested that the services occur directly between the speech therapist and the family to focus on the swallowing.

The speech therapist will be providing updates and sharing what occurred at the virtual team meeting with the family present.

Reminders for Updating an IFSP

- If an IFSP review is scheduled before a PSD and a service has not begun from a previous IFSP, the PSD remains the same unless the family requests otherwise.
- If an IFSP review is conducted on the same day of a planned service visit, the visit should not be shortened to accommodate the meeting unless it is requested by the family.
- The end date of the IFSP should be the date the next review is due but no later than 6 months from the date of the current IFSP.
- An annual IFSP must occur no later than 12 months from the date of the previous initial/annual IFSP.

General Reminders

- Families must be invited when their child is scheduled to be discussed at team meetings.
- It is the responsibility of the holder of the child's official record to maintain a complete copy of the child record.
- Failure to provide a complete copy of the child record upon request may result in corrective actions.
- DDD application packets submitted after the Developmental Evaluation Report is more than one year old must include a complete assessment tool and/or current medical records and the current IFSP.
- SPAs must have internal processes in place to continuously monitor that all staff understand and are implementing services and supports in accordance with AzEIP Policy and Procedure and current technical assistance.

Resources we would like to share*

*IDEA Regulations and AzEIP Policy/Procedure references specific to the slide show will be available in the PDF copy of the presentation for attendees to reference.

[EIP Policy Manual](#)

[Service Coordination in Early Intervention](#)

[AzEIP Procedure Manual](#)

[Knowledge and Skills for Service Coordinators \(KSSC\)](#)

[AzEIP Billing Manual](#)

[Selecting the Most Likely Team Lead](#)

[Writing the IFSP for Your Child](#)

[FAB Schedule](#)

[Family Service Coordination Toolkit](#)

[Framework for Reflective Questioning](#)

Questions



Question 1

How do we document the length of service coordination visits on the IFSP and in I-TEAMS if the IFSP is considered a service delivery unit? IFSPs may take 90 minutes and our planned monthly contact will be 30 minutes?

The AzEIP team will be providing further clarification around the topic of identifying service coordination frequency on the IFSP. At this time we request that you follow the advice provided to you at the presentation. Thank you for your patience in this matter.

- Service coordination planned start date begins on the date of the IFSP Meeting.
- Service coordination units include the creation of the IFSP.
- The team which includes the family identifies the service coordination
 - Number of direct service units to be provided
 - Length of the monthly scheduled services
- The length identified on the IFSP should be based on the monthly contact and will not include the length of the meeting to create the IFSP
 - I-TEAMS will not reflect the IFSP meeting as utilization of a service delivery visit
 - I-TEAMS has units built in for the creation of the IFSP

Question 2

Please review the guidance provided around the 6 month IFSP?

- Scheduling an IFSP meeting should be purposeful and intentional. Teams determine the duration of the IFSP based on the needs of the child and family and IFSP timeline requirements.
- Timeline Requirements:
 - A periodic review must be completed at a minimum of once every 6 months, there is not a requirement for a “6-month IFSP Review Meeting”.
 - Annual IFSPs must be held no more than 12 months after the completion of the Initial IFSP or Annual IFSP.
- IFSP active team members including the family must discuss the most appropriate duration for the IFSP they are creating by considering timeline requirements and if there is a required meeting due to be scheduled such as a
 - Transition Planning Meeting
 - Transition Conference
 - 90 day review
 - Annual IFSP
- Does the team anticipate the need to review and update the services identified on the IFSP in less than six months?
- The team must ensure when planning the duration of an IFSP that the Child Outcome Summary is completed as close as possible to six months after the last Initial or Annual IFSP and updated at the Annual IFSP.

Question 3 & 4

What is the earliest an annual IFSP can be completed?

- An Annual IFSP should be completed no later than 12 months from the initial or previous annual IFSP.
- The Annual IFSP may be completed earlier if the team has identified that it would be appropriate and beneficial for the child and family.

If families are choosing to use the UN intensity option (services occurring together with another child), do they need a separate home visit record for each child?

- The expectation would be that any provider billing under the “UN” intensity option would create a Contact Log for each child to be stored separately in the child’s record.

Question 5

What do we do for two IFSPs for siblings where the Teacher of the Visually Impaired (TVI) is I (services are individual) and all the other providers are utilizing the UN intensity option (services occurring together with another child)?

- The team including the family determines at the IFSP the frequency, intensity and duration of services.
 - Discussions are to be documented within the IFSP and the provider logs.
 - The decisions of the team are documented on the IFSP.
- The primary intensity of services (one child, two children or multiple children) must be provided as identified on the IFSP.
- If IFSP service deliveries occur for two or more children at the same time, the services must be billed using the Multiple Children 2 (UN) or Multiple Children 3 (UP) intensity option.
- The contact log completed by the provider must accurately indicate the date and time of visits, the intensity that is being billed as well as include the parent's signature.

Question 6

What is the basis of the monthly service coordination requirement?

- IDEA Part C Regulations state that service coordination is an active and ongoing process (IDEA 303.34(a)(3) . AzEIP defines “active and ongoing process” as being provided at a minimum on a monthly basis. Federal regulations outline 10 specific service coordination activities:
 - Assisting parents of infants and toddlers with disabilities in obtaining access to needed early intervention services and other services identified in the IFSP, including making referrals to providers for needed services and scheduling appointments for infants and toddlers with disabilities and their families;
 - Coordinating the provision of early intervention services and other services (such as educational, social, and medical services that are not provided for diagnostic or evaluative purposes) that the child needs or is being provided;
 - Coordinating evaluations and assessments;
 - Facilitating and participating in the development, review, and evaluation of IFSPs;
 - Conducting referral and other activities to assist families in identifying available [EI] providers;
 - Coordinating, facilitating, and monitoring the delivery of services required under this part to ensure that the services are provided in a timely manner;
 - Conducting follow-up activities to determine that appropriate part C services are being provided;
 - Informing families of their rights and procedural safeguards, as set forth in subpart E of this part and related resources;
 - Coordinating the funding sources for services required under this part; and
 - Facilitating the development of a transition plan to preschool, school, or, if appropriate, to other services.

Question 7 & 8

How do we do data validations or corrections for our current monitoring period since the IFSP Service Utilization report is not currently identifying the IFSP as the service coordinator's utilized unit? Do we need to do a data correction for each one?

- Data corrections are not required for service utilization units to identify the IFSP as a service coordinator's utilized unit.
- If there is a question on if a data correction is needed, please reach out to your AzEIP Continuous Quality Improvement Coordinator.

How will monitoring for service coordination units be accomplished if the IFSP is included as a service delivery but the Service Utilization Report does not pull the IFSP as a unit?

- Reviewers of SC IFSP completed units will take into consideration that the IFSP unit is not reflective on the report and will need to manually add it to the count.

Question 9

How do we invite a family to a team meeting and keep the other children's information confidential?

- Thank you for your identification of the need to keep all children and their families' information confidential. Your agency will come up with what works best with how your agency operates- some examples from SPAs are:
 - Virtual Team Meeting:
 - Arrange to call the family at the beginning of the team conference before discussing other children.
 - Schedule separate short virtual meetings during the team meeting times for each family who wishes to participate.
 - Some virtual platforms also have lobbies, waiting rooms, break out rooms, or require permission to admit someone which could also be used.
 - In person Team Meeting: Invite the family to the physical location, put away all documentation and invite the family in when it's time to discuss their child.

Question 10

What type of documentation is needed to show compliance that a family was invited to a team meeting? What kind of documentation will be accepted? Will we need to upload the email?

- At this time there is not a form that is sent to the family to invite them to a team conference.
- How the family is invited would be based on the team and the family's preferred method of communication.
- The expectation is that the SC or provider would document in their contact logs the method of invitation and the family's response.
- Any written communication about the child or family (text messages, emails, letters) must be maintained in the child's record.
- In addition, the team meeting documentation must identify who was present for the discussion.

IDEA Part C IFSP Regulations

[303.343](#) IFSP Team meeting and periodic review.

[\(a\)](#) Initial and annual IFSP Team meeting.

(1) Each initial meeting and each annual IFSP Team meeting to evaluate the IFSP must include the following participants:

(i) The parent or parents of the child.

(ii) Other family members, as requested by the parent, if feasible to do so.

(iii) An advocate or person outside of the family, if the parent requests that the person participate.

(iv) The service coordinator designated by the public agency to be responsible for implementing the IFSP.

(v) A person or persons directly involved in conducting the evaluations and assessments in [§303.321](#).

(vi) As appropriate, persons who will be providing early intervention services under this part to the child or family.

IDEA Part C IFSP Regulations 2

(2) If a person listed in paragraph (a)(1)(v) of this section is unable to attend a meeting, arrangements must be made for the person's involvement through other

means, including one of the following:

- (i) Participating in a telephone conference call.
- (ii) Having a knowledgeable authorized representative attend the meeting.
- (iii) Making pertinent records available at the meeting.

IDEA Part C IFSP Regulations 3

(b) Periodic review.

(1) A review of the IFSP for a child and the child's family must be conducted every six months, or more frequently if conditions warrant, or if the family requests such a review. The purpose of the periodic review is to determine—

- (i) The degree to which progress toward achieving the results or outcomes identified in the IFSP is being made; and
- (ii) Whether modification or revision of the results, outcomes, or early intervention services identified in the IFSP is necessary.

(2) The review may be carried out by a meeting or by another means that is acceptable to the parents and other participants.

IDEA Part C IFSP Regulations 4

(c) Annual meeting to evaluate the IFSP. A meeting must be conducted on at least an annual basis to evaluate and revise, as appropriate, the IFSP for a child and the child's family. The results of any current evaluations and other information available from the assessments of the child and family conducted under [§303.321](#) must be used in determining the early intervention services that are needed and will be provided.

(d) Accessibility and convenience of meetings.

(1) IFSP meetings must be conducted—

(i) In settings and at times that are convenient for the family; and

(ii) In the native language of the family or other mode of communication used by the family, unless it is clearly not feasible to do so.

(2) Meeting arrangements must be made with, and written notice provided to, the family and other participants early enough before the meeting date to ensure that they will be able to attend.

IDEA Part C IFSP Regulations 5

303.342(e) Parental consent. The contents of the IFSP must be fully explained to the parents and informed written consent, as described in §[303.7](#), must be obtained, as required in §[303.420](#)(a)(3), prior to the provision of early intervention services described in the IFSP. Each early intervention service must be provided as soon as possible after the parent provides consent for that service, as required in §[303.344](#)(f)(1).

IDEA part 303.421 (a)

(a) General. Prior written notice must be provided to parents a reasonable time before the lead agency or an EIS provider proposes, or refuses, to initiate or change the identification, evaluation, or placement of their infant or toddler, or the provision of early intervention services to the infant or toddler with a disability and that infant's or toddler's family.

(b) Content of notice. The notice must be in sufficient detail to inform parents about—

- (1) The action that is being proposed or refused;
- (2) The reasons for taking the action; and
- (3) All procedural safeguards that are available under this subpart, including a description of mediation in §303.431, how to file a State complaint in §§303.432 through 303.434 and a due process complaint in the provisions adopted under §303.430(d), and any timelines under those procedures.

IDEA Part C 34 CFR Part 303 Supplementary Information

Procedures for IFSP Development Review, and Evaluation (§ 303.342)

“addressing the needs of the family in the IFSP process is crucial and should be determined in a **collaborative manner** with the **full agreement** and **participation** of the parent of the infant or toddler.”

OSEP Nix Letter March 17, 2023

Transition Conference: Part C Responsibilities

Question 3: What are the State lead agency and EIS provider's responsibilities under Part C of the IDEA for convening a transition conference with the LEA to ensure a seamless transition for toddlers with disabilities turning three years old who are identified as potentially eligible for preschool services under Part B of the IDEA, consistent with 34 C.F.R. § 303.209(c)(1)?

OSEP Response: For a child exiting Part C who is potentially eligible for Part B preschool services, "the lead agency, with the approval of the family of the toddler, convenes a conference among the lead agency, the family and the LEA, not fewer than 90 days and at the discretion of all parties, not more than nine months before the toddler's third birthday to discuss any services the toddler may receive under Part B." 34 C.F.R. § 303.209(c)(1). **The transition conference must meet the accessibility, convenience, and participant requirements for IFSP meetings in 34 C.F.R. §§ 303.342(d) and (e) and 303.343(a).**

The State lead agency must provide written notice of the transition conference to the family and other participants, which includes the LEA, early enough before the meeting date to ensure that they will be able to attend, under 34 C.F.R. § 303.342(d)(2). The State lead agency may, but is not required to, combine the invitation to the transition conference in 34 C.F.R. § 303.209(c)(1) and the transition notification in 34 C.F.R. § 303.209(b). If the State lead agency does not invite the parents and the appropriate LEA to the transition conference, it has not met the IDEA transition conference requirements in 34 C.F.R. § 303.209(c)(1). If the State lead agency provides timely notification to the SEA and the appropriate LEA and the LEA fails to attend the transition conference, the State lead agency must still hold the transition conference to provide the family with information about Part B preschool services and may use the transition conference meeting to develop or revise the transition plan in the child's IFSP.

AzEIP Policy Manual

3.10 Periodic and Annual Review of the IFSP

3.10.2 A review of the IFSP for a child and the child's family must be conducted in-person at least every six months.

3.10.3 The purpose of the periodic review is to determine:

- A. the degree to which progress toward achieving the results or outcomes identified in the IFSP is being made; and
- B. whether modification or revision of the results, outcomes, or early intervention services identified in the IFSP is necessary.
- C. Complete the COS process if the periodic review is a six-month IFSP review, including the Child Outcomes Summary form. If needed, the multidisciplinary team may use a broad-spectrum assessment tool (i.e., criterion-referenced).

AzEIP Policy Manual 2

3.10.4 Other reviews may occur more frequently if conditions warrant, or if the family requests such a review.

3.10.5 All IFSP reviews must:

- A. be conducted in the native language of the family or other mode of communication used by the family
- B. be arranged with, and written notice provided to, the family and other participants early enough before the meeting date to ensure that they will be able to attend.

3.10.6 IFSP team members currently providing services to the child and family are required to attend IFSP meetings in person with the one exception of the team member who conducted the assessment who, if unable to attend the meeting in person, may have arrangements for the person's involvement through other means, including:

- A. participating in a telephone conference call
- B. having a knowledgeable authorized representative attend the meeting
- C. making pertinent records available at the meeting, such as a quarterly report.

AzEIP Policy Manual 3

3.10.7 Changes to early intervention services on the IFSP must be documented on the Addendum pages of the IFSP.

3.10.8 Each early intervention service must be provided in accordance with the IFSP planned start date, which should be as soon as possible after the IFSP meeting where the parent consents to the service, and in a manner that best supports the IFSP outcome and recognizes the family's priorities and schedules.

3.10.9 A meeting must be conducted on at least an annual basis to evaluate and review the existing IFSP, as appropriate, and develop a new IFSP for the child and family. The results of any current evaluations and other information available from the assessments of the child and family conducted must be used in determining the early intervention services that are needed and will be provided.

AzEIP Policy Manual 4

3.10.10 An annual assessment must be conducted before or during the annual IFSP meeting and sufficiently comprehensive to develop a summary of the child's present levels of development for the annual IFSP. The annual assessment must meet the following requirements:

- A. Consent to conduct the child assessment must be obtained prior to conducting the child assessment
- B. Consent to conduct the family assessment must be obtained prior to conducting the family assessment
- C. The Child and Family Assessment Guide for Families must be provided to the family at least two weeks prior to the scheduled annual IFSP date.
- D. Complete the COS process if the periodic review is a six-month IFSP review, including the Child Outcomes Summary form. If needed, the multidisciplinary team may use a broad-spectrum assessment tool (i.e., criterion-referenced).

AzEIP Policy Manual 5

3.10.11 The annual IFSP meetings must:

- A. Be held in settings and at times that are convenient to families
- B. Be conducted in the native language of the family or other mode of communication used by the family
- C. Be arranged with, and written notice is provided to, the family and other participants early enough before the meeting date to ensure that they have a reasonable opportunity to attend.
- D. Include the IFSP team.

3.10.12 The contents of the IFSP must be fully explained to the parents and informed written consent must be obtained, prior to the provision of early intervention services described in the IFSP.

AzEIP Procedure Manual 1

3.11 Periodic Review

3.11.1 The service coordinator ensures the IFSP is reviewed every six (6) months or more frequently if the parent or other IFSP team member requests a review.

A. If the child is eligible for DDD under the Targeted Service Coordination (TSC) or Arizona Long Term Care System (ALTCS) categories, the service coordinator ensures the IFSP is reviewed every 90 days in accordance with DDD policy and procedure.

AzEIP Procedure Manual 2

3.11.2 The service coordinator is responsible for all the following activities:

A. Scheduling the IFSP review meeting with the family and all active IFSP team members providing services.

1) If the child has been receiving service coordination only, a Team Lead must still be identified and attend the periodic review with the SC and family.

B. Sending the written IFSP meeting notification with the agreed-upon date, time, and location of the meeting to the family, IFSP team members, and any other participants requested by the family, early enough before the IFSP review meeting to ensure that they will be able to attend.

C. Ensuring the necessary steps are taken for the review to be conducted in the native language of the family or other mode of communication used by the family, unless clearly not feasible to do so.

D. Documenting any revisions and/or updates to the child's demographic, health, present levels of development and child and family assessment information in the most recent initial or annual IFSP document.

E. Documenting the progress toward achieving the outcomes, as well as any necessary revisions to the outcomes and/or strategies, and any new outcomes needed in the most recent Initial or Annual IFSP document.

AzEIP Procedure Manual 3

F. Completing the COS (Child Indicators) process with the family and team as part of the process of documenting the child's progress.

G. Use the IFSP Addendum pages to document the team's decision regarding early intervention services.

- 1) In rare circumstances, a change in the TL may be needed if a family member requests a change due to a personality conflict or when the parent and/or TL believes that even with assistance from other team members, he/she is not the best fit to continue supporting the family.

H. Provide a PWN, obtain parental consent for changes to services, and if needed, obtain consent to use private insurance.

I. Provide a written copy of the family's procedural safeguards, which are detailed in the Child and Family Rights in the Arizona Early Intervention Program (AzEIP) booklet, and explains all their rights including but not limited to the following:

- 1) if the parent agrees to the IFSP as written, the parent's signature on the IFSP is consenting to initiate services
- 2) the parent's option to accept/decline services if the parent disagrees with the services identified on the IFSP
- 3) the dispute resolution process (i.e., filing a complaint, requesting mediation or a due process hearing) if the parent disagrees with the IFSP as written.

AzEIP Procedure Manual 4

3.11.3 Active IFSP team members should attend IFSP reviews in person per best practice. If team members are not able to attend in person, they must attend by phone or provide written documentation of the child's progress prior to the meeting.

3.11.4 The service coordinator ensures the family, IFSP team members, and any other individuals with whom the family has consented to share the IFSP, such as the pediatrician, Healthy Families, Early Head Start, DCS, other early education or childcare programs, receive a copy of the IFSP, including the Addendum pages, within ten business days following the IFSP meeting.

Thank you for attending!

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