



Infant & Toddler
Connection of Virginia

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To: System Managers

From: Mary Anne White
Bonnie Grifa

Re: Clarification on Record Reviews

I. Selection of records for Multidisciplinary Team Assessment and Timely Initiation of Services

To obtain a list of records you are to use, you will need to generate 3 reports:

1. To generate the active cases between November 1, 2005 through June 30, 2006
 - ◆ Click on Custom Case Reports (ITOTS)
 - ◆ Click on Age of Active Cases
 - ◆ In the Criteria box, "Date of IFSP" enter the begin date as November 1, 2005 and enter end date as June 30, 2006
 - ◆ Click Generate
 - ◆ This will give you all child who were active in that time period.
2. To determine the children who have had annual IFSP's within this time period; use Attachment A. (This is the only purpose for Attachment A; to determine annual IFSP dates)
 - ◆ Local System Managers can produce the "due" date of the annual IFSP by following these steps:
 - ◆ Go to ITOTS, click Reports
 - ◆ Click OSEP Verification Reports
 - ◆ Click ITOTS Children Active with an IFSP Report
 - ◆ Select start date as 11/1/2005 as outlined in the instructions for selecting records
 - ◆ Check "yes" that you want an excel report
 - ◆ Once the excel report is open, you will see a title to the report with several lines used for this information. Delete this information so that line 1 contains only the header titles for each column. Line 2 and beyond will be a listing of all the active children in your system from 11/1/2005 until the date you pulled the report.
 - ◆ Move the curser to Column "H" line 2 and type in =(G2+365) Press enter. You should see a date that is one year from the date of the initial IFSP which is listed in Column "G"

- ◆ Copy the formula =(G2+365)
 - ◆ Highlight the rest of Column H so that all active children are highlighted.
 - ◆ Paste the formula into the highlighted area and you will have annual IFSP date for all children.
 - ◆ Sort the table by highlighting all the names of children, clicking on “Data” on the toolbar, click the A-Z (be sure you organize by Column H) and you will have the oldest dates of annual IFSP’s listed first running to the most recent.
 - ◆ Locate the annual IFSP's written between November 1, 2005 and June 30, 2006
 - ◆ Once you locate those annual IFSP's within the designated time period, you may choose to sort the information by name
3. You will need to pull a list of children who have discharged from your local system
- ◆ Go to ITOTS, click Reports
 - ◆ Click OSEP Verification Reports
 - ◆ Click Children Discharged
 - ◆ Select start date as 11/1/2005 as outlined in the instructions for selecting records
 - ◆ Select end date as 6/30/06 as outlined in the instructions for selecting records
 - ◆ Check "yes" that you want an excel report
 - ◆ Once the excel report is open, you will need to sort this information in the same manner that you did for the annual IFSP's.
 - ◆ You will need to cross walk and eliminate those children on the annual IFSP list who were discharged prior to their annual IFSP
4. Add the number of children in the Active cases and the number of children in your annual IFSP form after you have eliminated those children who were discharged prior to their annual IFSP. This number is the number you determine your percentage that you will "drop the pencil" on.

II. Timely Initiation of Services

Questions have been asked about the documentation needed to support the IFSP teams decision to start services greater than 21-calendar days from the date the IFSP was signed. Folks indicated that there was documentation in the child's record for situations such as child/family ill, family scheduling preference provider unavailability, temporarily lost contact, etc, but thought that the signatures of all IFSP participants was sufficient documentation to support "Team planned a later start date to meet child/family needs".

In the October 11, 2005 memo sent to you by Mary Ann Discenza, it stated:
 "Based on discussions and input provided through the regional meetings, Virginia will use the following working definition for “timely:”

Entitled services listed on the IFSP begin within 21 calendar days of the IFSP meeting. Early intervention services may begin more than 21 calendar days following the IFSP meeting if the IFSP team decides on and documents the reasons for a later start date in order to meet the individual needs of the child and family."=

In the April 21, 2006 memo sent to you by Mary Ann Discenza, it included a modification to Virginia's definition of "timely": It stated:

Entitled services listed on the IFSP begin within 21 calendar days of the date the parent signs the IFSP. Early intervention services may begin more than 21 calendar days following the parent signing the IFSP if the IFSP team decides on and documents the reasons for a later start date in order to meet the individual needs of the child and family.

Please note that documentation of reasons may be included/found in the IFSP (pages 2 or 4 or on the outcomes pages), progress notes, etc.

III. Excel Database

We are in the process of finalizing an excel database that you will need to enter your record review information on and submit to the Part C Office. For those who are using the "Record Review Tabulation form", you will not need to complete the excel database as it is basically the same thing. We hope to have this out to you by next week.