

**EXAMPLE PROVIDED BY: Bridges for Families Birth to 3 Program**

**IFSP Update Checklist**

**--The Law---**

**Annual Meetings**

- ⇒ At least annually, SC will convene a meeting at which the IFSP shall be evaluated and revised. Those participating are families and those who developed the initial IFSP, those providing services to the child, those who are directly involved in the assessment/evaluation. (Get as many of providers together as possible)
- ⇒ The meeting will be in a setting and at a time convenient to families. A written notice is sent to the family early enough to ensure their attendance. Meetings will be conducted in a family's native language or with an interpreter.
- ⇒ Re-evaluation must be done annually (this is providers responsibility to remember)
- ⇒ To the extent possible providers must be present, be represented by conference call, have a representative attend, or make pertinent records available
- ⇒ Look at Me Pages must be filled out along with strengths and needs pages.

**6 Month Reviews**

- ⇒ According to HFS 90.10 (7), a periodic review of the IFSP will take place at least every 6 months or more frequently if 1) warranted or 2) at parents request.
- ⇒ The update can be via a meeting or by "other means acceptable to the parent" and those involved.
- ⇒ Those participating should at least be the parents and the service coordinator. Parents can invite other family members or an advocate
- ⇒ Those conducting an evaluation or assessment or those providing services can be present "if conditions warrant".

**Purpose of an update----**

- ⇒ Determine progress being made toward achieving the outcomes and whether revisions or modifications of outcomes is necessary

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**Prior to the IFSP Update Meeting:**

- Schedule the IFSP meeting at a time and place that is convenient for the family and service providers (if they will attend).
- Send the IFSP invitation to the family with an Early Intervention Rights brochure.
- You can also send Look at Me pages, strengths and needs, and routines pages to streamline the process.

**At the meeting:**

### **Work from the current copy of the IFSP:**

- Review all IFSP information on the Family Info Page
- Write date at IFSP -2, 3, 4, 5 or 6
- If the child has MA, you must update the Look at Me Pages every six months (otherwise annually)
- Update Strengths/Challenges/Changes Page (if needed at 6 month review) annually
- Review each outcome using the column on the Our Plan page. Include the date and statement(s) of progress, "continue goal" or "goal met" if applicable. If necessary, add further strategies.
- Add additional Outcome Pages, if appropriate.
- Update Transition Pages with transition activities, if applicable.
- Review Summary of Services Page. Record any changes.
- Parent and service coordinator (and providers present) initial update on summary page to verify and agree with changes.
- Redo Total Cost of Plan Page/Katie Beckett Total Cost of Plan Page with any changes, if necessary.

### **Other Paperwork to Bring to an Update Meeting:**

(hint: put a folder of these forms in your car so you always have them with you!)

- Consent to Access Insurance form, if needed
- HMO Exemption form, if applicable
- Extra Release of Information Forms. (Release forms must be updated every year. Bring to annual IFSP) Some examples of when these will need to be filled out are: to communicate with daycare providers and to provide services in a daycare setting, when a child has been seen or will be seen by a medical specialist, when there are other agencies involved, and when a child is approaching transition to MMSD or other programs
- Missed Visits Guidelines
- Determination of Cost/Katie Beckett Determination of Cost page

### **Information to Gather/Share and Questions to ask the Family:**

- Clarify the role of the Service Coordinator and discuss how much contact they would like with the SC. If a child has MA, these guidelines state that at a minimum there should be one family or collateral contact every month; one face-to-face contact with the family every 3 months, child need not be present. These are also the guidelines the State recommends for all families.
- Ask if they would like for us to send our reports to the doctor or anyone else
- Verify that the current visit schedule is working and appropriate. Ask the family when the child naps and what days/times/locations work best for receiving services
- Verify that things are going well with direct service providers
- Explain to the family that a copy of the IFSP update will be sent or given to them

at a future visit. Also, that copies will be sent to the provider(s) who will work with the family.

- Ask whether they would like the IFSP to be sent to anyone else (e.g., the daycare provider.)
- Remember to have signatures on the IFSP, Total Cost of Plan page and all releases.

### **Things To Do Back at the Office:**

- Review IFSP update for clarity, misspellings, neatness, full sentences etc. (no white out allowed; line out mistakes with a single strike and initial)
- Paperclip any pages with changes
- Submit the IFSP for review
- No release of information is needed for Bridges staff or outside providers who have a signed agreement to provide services for Bridges.
- Request Declaration of Income Form from if significant change in income or family size.

If approved:

IFSP given to office staff who will enter IFSP information into the database.  
Office Staff will copy paper clipped pages of IFSP update and send to family, providers, and put in client's chart

If not approved:

Program Coordinator returns IFSP update to Service Coordinator for corrections  
Service Coordinator makes necessary changes/additions to IFSP  
If major changes made, Service Coordinator gets approval/signatures from team/family (this rarely would happen....)  
Service Coordinator returns IFSP update to Program Coordinator's box  
Follow "approved" process