

Chapter 8: Individualized Family Service Plan Review



The IFSP is a fluid document that must be periodically reviewed by the Service Coordinator and family. The Individualized Family Service Plan (IFSP) may be revised in order to reflect a child's developmental needs as well as changes in family priorities, concerns and resources. All team members have an obligation to collaborate to revise the IFSP as needed.

Periodic Review

State and Federal regulations refer to periodic reviews as the required six month review, and those meetings that are scheduled more frequently if conditions warrant, or if the family requests such a review. The purpose of periodic review is to determine the degree to which progress toward achieving the outcomes is being made, and whether revision or modification of the outcomes or services is necessary. In Missouri, meetings that are scheduled more frequently if conditions warrant are referred to as **inter-periodic** reviews in order to distinguish them from the required **six month** reviews.

Each **periodic** (six-month and inter-periodic) review must include the following participants:

- The parent or parents of the child;
- Other family members, as requested by the parent, if feasible to do so;
- An advocate or person outside of the family, if the parent requests that the person participate;
- The ongoing service coordinator for the child and family;
- The individuals who conducted evaluations or assessments used to plan for the IFSP, as appropriate; and
- Service providers, as appropriate.

NOTE:

If conditions warrant, provisions must be made for the participation of individuals who have conducted assessments for the purpose of planning for the current IFSP. The service coordinator may invite all of the child's providers, but **at a minimum**, must invite any providers who are providing services that will be discussed because of the potential change in those services or related outcomes and strategies.

I. Six-month Review

Six-month reviews **MUST** be held no later than 180 days past the initial or previous annual IFSP meeting. **There are no allowable exceptions to this timeline.** It is important to plan ahead and schedule the meeting in ample time to ensure compliance with this requirement. It is acceptable to hold a six-month review up to one (1) month prior to the six-month due date.



The Service Coordinator may conduct a six-month review in one of two ways:

- 1) **Poll the IFSP team members.** The Service Coordinator calls the parent and each member of the IFSP team to determine progress on outcomes and find out if any changes to the IFSP are warranted. If no changes to outcomes or services are needed, the team may decide no meeting is necessary; however, the Service Coordinator must document this decision in case notes and enter the six-month meeting information into WebSPOE.
- 2) **Schedule a face-to-face meeting.** If any IFSP team member wants to discuss a possible change in outcomes and/or services, it is the expectation that a meeting will be conducted because of the potential for a change in outcomes and/or services on the IFSP.



When a six- month review is being conducted by meeting, the Service Coordinator must send out the meeting notification form to all appropriate participants early enough to ensure their attendance. The same written meeting notification procedures are followed as outlined in Chapter 6: IFSP Planning. If a service provider cannot attend or participate by conference call, the Service Coordinator should attempt to obtain a written report; however they must not delay the meeting beyond the required timelines.



Regardless of the meeting method, the Service Coordinator must enter the IFSP meeting information into WebSPOE in a timely manner. It is critical that this meeting information be entered as soon as possible following the meeting to update changes to the plan, especially when changes to provider authorizations may be immediately affected.



II. Inter-periodic Review

Inter-periodic reviews may be held as needed, depending on the child or family's concerns and priorities. This may occur when the Service Coordinator, family or provider is aware of concerns that need to be discussed prior to the required six month or annual review of the IFSP.

Since an inter-periodic review is only held when someone on the team has requested a team meeting to discuss issues that may result in a change in the outcomes or services on the IFSP, it is the expectation that a meeting **must** be held. All provisions listed above for conducting the six- month review meeting apply when a face-to-face meeting is held.

Annual Review

DESE ensures that a meeting is conducted at least annually to review the IFSP for a child and family. The annual IFSP meeting **MUST** be held no later than 365 days following the initial or previous annual IFSP meeting. **There are no allowable exceptions to this**



timeline. The requirement for the annual review incorporates the periodic review process. Therefore, only one separate periodic review each year is required (i.e., six months after the initial and subsequent annual IFSP meetings), unless conditions warrant otherwise.

It is essential that the annual review of the IFSP proceed in a timely fashion. The Service Coordinator should begin planning the meeting several months in advance and it is acceptable to hold the annual IFSP one (1) month prior to the end of the current IFSP.



The annual IFSP review includes the requirement to use current information available from ongoing child and family assessments (formal or informal) to determine what early intervention services are needed. It is best practice for Service Coordinators to set up a system to ensure that assessment, FCP and other IFSP planning activities are scheduled sufficiently in advance to avoid a delay in the annual timeline. If an annual IFSP is not reviewed in a timely manner, this may result in a delay in service authorizations which could interrupt services to a child/family.

Meeting Participants and Meeting Notification

The required annual meeting participants are the same as those listed previously under periodic reviews. It is expected that the Service Coordinator will invite all of the child's current service providers to the annual IFSP meeting in order to facilitate a complete and meaningful meeting to evaluate the IFSP.

The annual IFSP meeting should be conducted in person; however, the Service Coordinator must not delay the meeting beyond the required timelines in order to find a universal date.

If the person(s) who conducted ongoing assessments for the purpose of IFSP planning cannot attend, they may participate in one of the following ways:

- 1) by conference call;
- 2) by having a knowledgeable, authorized representative attend; or,
- 3) by making pertinent records available at the meeting.

The method of participation should be noted on the attendance page of the IFSP.

Meeting arrangements must be made and written notification provided to the family and other participants early enough before the meeting date to ensure that they will be able to attend.



The Service Coordinator must review and revise each section of the IFSP in WebSPOE in a timely manner. It is critical that the Service Coordinator finalize the annual IFSP quickly in order to generate new authorizations for the new IFSP period. It is the expectation that all IFSP meetings are finalized as soon as possible, generally within 10 calendar days of the IFSP meeting.



Changes to IFSPs as a Result of Periodic or Annual Reviews

Changes in outcomes or services on an IFSP, other than changes in provider name or funding source, are **ALWAYS** made as a result of an IFSP team discussion of the proposed changes. This would include changes in location, frequency, intensity, individual vs. group, start and end dates, and method.

Any time there is new service added **OR** a change in location, type or amount of service, written Notice of Action/Consent from the parent **MUST** be obtained by the Service Coordinator prior to the initiation of the change in service, **and** a copy of the Parental Rights Statement must be provided to the family.



The Service Coordinator must update all relevant information in WebSPOE in a timely manner. Copies of any Notice of Action/Consent forms must be maintained in the child's hard copy file in the SPOE office.



Holding IFSP Meetings Without Parent Participation

There are some circumstances in which a Service Coordinator may determine it is necessary to hold a meeting without a parent's participation after making the appropriate attempts to notify the parent of the meeting. For example, a corrective action may have been ordered based upon a child complaint, requiring the convening of the IFSP team within a given period of time to discuss compensatory services. If the family has been contacted and is not responsive or has not followed through with meeting attendance, this would be a time when it would be necessary to proceed with the IFSP meeting without the family's participation.

There may also be circumstances in which the service coordinator has made multiple attempts to schedule and hold an IFSP meeting and the parent does not show up for the meeting that has been scheduled, but the child is continuing to receive services. In cases such as these, the Service Coordinator should hold the meeting without the parent following these procedures:

- The Service Coordinator must make two (2) attempts to schedule the IFSP meeting with the family. Each attempt must include written meeting notification through the US Postal Service (does not have to be certified).
- For each of the two attempts, the written meeting notification must be provided **at least 10 calendar days prior to the meeting**, unless the parent waives the 10 days and agrees to hold the meeting earlier, in which case the written meeting notification may be provided in less than 10 days, including the day of the meeting.



- If the meeting has been scheduled and the family fails to attend the first meeting, the Service Coordinator must make the second attempt to schedule the meeting.
- The Service Coordinator may wish to schedule the second meeting at the SPOE office or another neutral site, so that if the family does not attend, the other participants may proceed with the meeting.
- If the parent does not attend the second meeting, the Service Coordinator proceeds with the meeting and enters all IFSP meeting activities in WebSPOE to document the meeting was held in order to meet timelines.

Since successful early intervention is dependent on family engagement and participation in the IFSP process, it is expected that holding IFSP meetings without the family present would be the exception, rather than the rule.

Lapsed IFSP Authorizations

Service Coordinators must ensure that annual and periodic IFSP reviews are held within the timelines established by First Steps. This is done to ensure that there is no disruption in services for the child and family. However, should IFSP service authorizations lapse due to unforeseeable circumstances (e.g., child is hospitalized or other family emergency), the SPOE Director has the ability to create a lapsed IFSP and extend service authorizations for up to 45 days after the annual IFSP expires. Creation of lapsed IFSP Authorizations should be under rare circumstances and only when all attempts to conduct IFSP reviews within the required timelines have been unsuccessful.

