

Early Support for Infants & Toddlers



Practice Guide: IFSP Reviews

Overview

The needs of young children and their families change constantly throughout the early years. As early interventionists, it is important that we regularly review the family's concerns, resources, and priorities, progress towards achieving child and family outcomes, and the effectiveness of the early intervention services we provide. The IFSP is a document that captures the information we gather from our ongoing conversations and work with families and children. It has been designed to be dynamic, flexible, and updated as needed to reflect the changing needs of children and families.

Part C Requirements for IFSP Reviews

Schedule of reviews: Part C of IDEA specifies two types of reviews that are required for every child's IFSP.

- **Periodic review:** "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" (§303.342(b)). At this review, the team along with the family discusses progress toward child and family outcomes and any new assessment information, and decides whether any changes or modifications are needed to current outcomes or services. The review may be carried out by a meeting or by another means that is acceptable to the parents and other participants. (34 CFR §303.342(b)2).
- **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, and as appropriate, revise its provisions" (§303.342(c)). At the annual IFSP, the full IFSP team including the family meets to discuss progress toward child and family outcomes and decide whether any changes or modifications are needed to outcomes or services. The team updates the annual IFSP at this time including updating present levels of development based on ongoing assessment information, revising and developing new outcomes as appropriate taking into account the families' priorities, and considering the services that will be needed and provided from that point forward.

Part C also requires a transition conference to be held for children approaching age three. The transition conference may be conducted at either a periodic or an annual IFSP review.

Participants at reviews (34 CFR §303.343(b)):

Periodic reviews must include:

- The parent(s) of the child;
- Other family members, advocates, or others at the request of the parent; and
- The FRC working with the family; and

- Any other participants deemed appropriate by the FRC or the family including, if conditions warrant, an evaluator or service provider.

The annual IFSP review must also include:

- A person directly involved in conducting ongoing evaluations and assessments; and
- As appropriate, any service providers working with child and family.
- If a person directly involved in the evaluation and assessment of the child is not able to attend, arrangements must be made for their involvement through a conference call, having a representative at the meeting, or making pertinent records available at the meeting.

Additional reviews: The IFSP can and should be reviewed whenever any team member, including the family, feels it is needed. This does not mean that every time information changes, the entire team needs to be convened to approve the changes. For example, address changes and changes in service providers do not require an IFSP review. Further information on minor changes is included below. These include being present via the phone, web-conferencing, (or other secure methods of communicating from a distance) or by providing written information or having records available at the meeting.

Examples

Here are a few examples of IFSP review scenarios when every team member cannot be present:

- The six month review of a child who receives services from an occupational therapist, a speech therapist and an early childhood special educator has been scheduled. The FRC and family schedule the meeting on Tuesday at 4 p.m. at the family's home, which is the time and location most convenient for the family. The early childhood special educator and speech therapist can attend, but the occupational therapist on the child's team works in another county that day and is not available. Prior to the meeting, she calls the FRC to discuss progress on IFSP outcomes and suggests some alternate strategies for the team to use to revise the functional IFSP outcomes. She then calls the family to share the same information, and arranges to write the suggested changes for the IFSP and sends it to the FRC and the other team members for consideration prior to the meeting.
- A child's annual review is scheduled for Monday at 10 a.m. at the child care program. The child's mother, FRC, child care provider and speech therapist are scheduled to meet to complete the annual review. Just before the meeting, the speech therapist calls the FRC to inform her that her child is sick and she needs to stay home. They arrange with the child care provider to bring a phone into the meeting room and to have the speech therapist participate over the phone.
- A child's father has asked for an IFSP review during a visit with the occupational therapist. He believes that his son has achieved his outcome for feeding and wants to move on to the next step. The occupational therapist agrees and calls the FRC, who is available in her office, and they put her on speaker phone to complete the changes. The FRC and the father arrange for the FRC to send the updated IFSP, the signature page, and the prior written notice form, along with a stamped envelope. She explains each document, answers the father's questions, and reminds him that a copy of the Procedural Safeguards/Parents' Rights document will also be included in the mailing for his

reference. The therapist notes why prior written notice was given at the time of the action rather than before.

- The early childhood special educator recognizes that a child has met his outcomes and that the six month review is not scheduled for another month. During her weekly visit, they call the FRC, add an additional outcome to the IFSP, and proceed as in the example above.

Practice Considerations

The development, review, and updates to an IFSP are achieved through a team process. Family Resources Coordinators, as the facilitators of each child's IFSP team, are responsible for ensuring that the IFSP is up to date, and in compliance with federal and state requirements. The other members of the IFSP team have a responsibility to share information with the FRC and other team members when families share concerns that could be addressed through the IFSP, or when any member of the team feels that outcomes or services may need to be revised. Regular, open exchange of information between team members is needed to make IFSP review meetings efficient and focused. By engaging in proactive and effective teaming throughout service delivery, teams will reach consensus about when IFSP reviews should occur, as well as how to conduct reviews to ensure each team member's participation. In addition, through development of the initial IFSP, the IFSP team will develop a plan for progress monitoring and reviewing progress toward meeting the functional IFSP outcomes.

As noted above, there are many ways that reviews can be conducted without every member present in the same room. In order for reviews to be accurate, reflect input from all members, and promote effective service delivery after reviews, the approach to facilitating everyone's involvement must be respectful, proactive, and collaborative.

- FRCs should plan well in advance of scheduled reviews and talk with families about potential dates, times, and locations that will work for IFSP review meetings. When planning, the FRC should consider events that may affect critical dates, i.e. holidays, weekends, or summer vacations. This information should be communicated to other team members, including those that the family wants to invite, as far in advance as possible. If a team member is unable to attend, then the FRC should coordinate with that person about how s/he will participate in the IFSP meeting prior to the meeting.
- Families should be informed about participation and attendance of team members during the planning of a meeting. If a provider is unable to attend, they should let the family know and decide which method of participation will be most effective and work best for everyone. Decisions made about the provider's attendance should also be communicated with the FRC and other team members so they have an opportunity to plan in advance.
- Providers working together with children and families should communicate with each other prior to the meeting about progress toward achieving outcomes and any recommended changes and modifications to supports or services. If some team members are then unable to attend, they will be effectively represented, and the team members at the meeting will be able to develop functional outcomes that are integrated across disciplines.

Completion of the Review and Ongoing Communication with the Team

During any IFSP review meeting, the FRC should complete the IFSP Review and the IFSP Review Agreement sections of the IFSP. Families should sign the agreement page indicating consent, be reminded of their prior notice rights, and given a copy of the procedural safeguards. Any changes to outcomes or services, updated assessment information, or new information from families about routines, activities, concerns, resources and priorities resulting from an IFSP review should be added to the body of the IFSP. Copies of the updated IFSP, including the review section, should be made available to every member of the IFSP team. The annual IFSP review will result in an updated IFSP. Copies of the updated IFSP must be made available to every member of the IFSP team including the family.

Minor Changes to the IFSP

There are times when FRCs or other service providers are made aware of minor changes that will need to be made to the IFSP. Examples of minor changes to the IFSP might include the following:

- Demographic information, such as addresses, phone numbers, and email addresses
 - Health and medical information, including new medications
 - Everyday routines, such as joining a new Mom and Me class or going to Grandma's once a week for the day
 - Other services, such as a new physician or the change in the name of the private speech therapist
- An IFSP review meeting is NOT needed when this type of information changes.

When the updated information IS needed on the IFSP, the following should occur:

- The service provider or FRC who learns of the changes or additions confirms them with family.
- The provider or FRC makes note of the changes in a working file or on a copy of the IFSP.
- Provider/FRC updates demographic information immediately in the DMS.
- Provider/FRC brings changes that have been gathered to the next scheduled IFSP review.
- The team conducts the review, and, along with any changes to outcomes, services or any other section of the IFSP, documents the minor changes on the IFSP Review section.
- After the review, provider/FRC updates all changed information in the DMS and provides a copy of the updated IFSP to family and other members of the IFSP team.

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