



SERVICE COORDINATION OVERSIGHT REPORT GUIDE



**Department of
Children & Youth**

Help Me Grow Early Intervention

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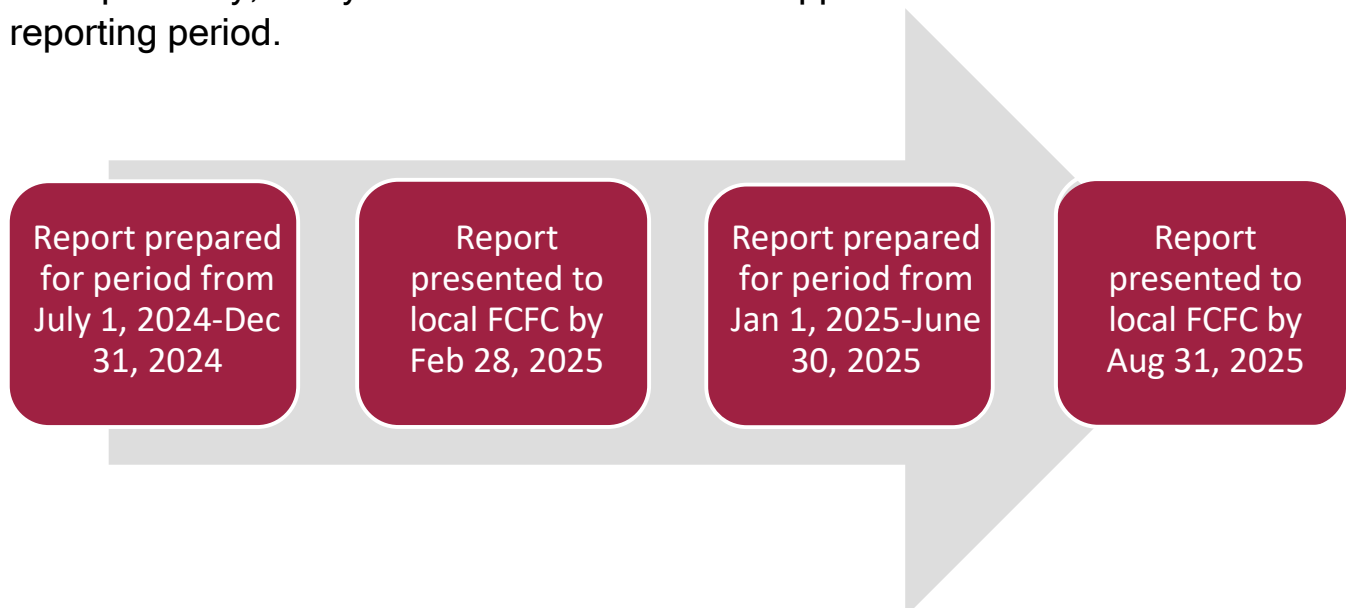
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SC Oversight Report Guide

Introduction

For SFY25, Early Intervention Contract Managers will be required to complete and deliver the EI Service Coordination Oversight Report to their local Family and Children First Council, or FCFC. The report will provide FCFCs with a more in-depth perspective of their local EI program, including information pertaining to EI referrals, outreach and child find, service coordination, EI services, transition, oversight, and compliance. The SC Oversight Report must be completed at least twice per year but may be completed and shared more often, depending on local priorities and needs. The first report will cover activities that occurred between July 1, 2024 and December 31, 2024 and must be shared with local council no later than February 28, 2025. The second report will cover activities that occurred from January 1, 2025 to June 30, 2025 and must be shared with local council no later than August 31, 2025.

This guide, including the appendices, contains instructions and resources for obtaining and calculating data needed to complete the report. Please note that there are multiple approaches that can be used to calculate and analyze data in Excel, so in many cases, these instructions are not the only way to obtain the information you need. Please also note that the dates in the screenshots are examples only, and you will need to utilize the applicable dates for each reporting period.



REFERRALS

TIP: The Referrals Extract report in EIDS will provide the total number of Central Intake and EI referrals for a given period, and the number of referrals received from various referral sources.

Under the referrals section, you will need to identify the total number of EI referrals received for both the current and previous reporting periods, as well as determine how many referrals were received from each of the various referral sources. *Please ensure that copies of all SC Oversight Reports are maintained locally so that information from the previous period can be easily obtained and reports are readily available should a copy be requested by the lead agency for EI.* The Referrals Extract report in EIDS may be used to obtain the information needed to complete this section. You will find this report listed under “Central Coordination Reports” in EIDS. The Referrals Extract report contains all referrals, so data will need to be filtered to include only EI referrals. See Appendix A for step-by-step instructions for obtaining the number of EI referrals received during the reporting period and the number of referrals from various referral sources using the Referrals Extract report. It is important to note that the total number of referrals may be slightly inflated if children were referred by two or more sources during the same reporting period.

For detailed instructions on running the Referrals Extract report, please visit the [Ohio EI website](#) and see the “[Referrals Extract Instructions and Tips](#)” guidance document.

OUTREACH AND CHILD FIND ACTIVITIES

TIP: Use your most recent Local EI Outreach report to complete this section and attach a copy when presenting to council.

Your program’s most recent Local EI Outreach report will provide much of the information necessary to complete the outreach and child find activities section. Please attach a copy of the Local EI Outreach report when presenting to your FCFC, as it may be used to describe what local outreach and child find activities were conducted during the current reporting period. The Local EI Outreach report, which is completed twice per year, includes detailed information on outreach activities that occurred during the reporting period and the results of

those activities (e.g., new referrals, increased public awareness, etc.). In addition, you will need to provide information regarding any upcoming outreach activities that are planned at the local level. Finally, please discuss any specific referral sources that are being targeted, how you are collaborating with Central Intake, and what support, if any, you may need from your local FCFC.

ELIGIBILITY

TIP: The 45-Day Compliance Monitoring report in EIDS will provide much of the specific data needed to complete the eligibility section of the report.

In this section, you will need data pertaining to EI eligibility for the current and previous reporting periods. *As mentioned in the previous section, it is important to maintain copies of all completed reports so that data for the previous reporting period may be easily obtained.* Information from the referrals section of this report will provide the total number of EI referrals for the current and previous reporting period. Of those referrals, you will then determine how many were determined eligible, how many evaluations were conducted, and how many referrals had an IFSP completed. If any initial IFSPs were not completed within the 45-day timeline, you will need to include noncompliance reasons associated with each. If any children were determined eligible, but did not have an IFSP developed, please explain.

Appendix B provides detailed instructions for using the 45-Day Compliance Monitoring report in EIDS to determine how many referrals during the reporting period were determined eligible, how many were determined eligible via evaluation, and how many went on to have an IFSP developed. When utilizing the 45-Day Compliance Monitoring report in EIDS, you have the option to run the report based on all referrals received or referrals who had a 45-day timeline ending during the specified timeframe. For the eligibility section, we will be using referrals who had a 45-day timeline ending during the reporting period. It is also important to note that the 45-Day Compliance Monitoring report only includes records that were open for at least 45-Days (after the EI referral). For these reasons, data from the 45-Day Compliance Monitoring report may not be an exact match to that of the Referrals Extract report.

SERVICE COORDINATION

TIP: Use your most up-to-date Addendum B EI Contact Sheet and SC Grant Program Narrative to assist you in completing this section of the report.

In the service coordination section, you will need to describe your local service coordination staffing plan, including the current number of EISCs, FTEs, vacancies, recruiting efforts, challenges, etc. Addendum B, also referred to as the EI Contact Sheet, is submitted to DODD annually with EI service coordination grant materials and within 14 days of any changes in personnel (see Figure 1 below). Your most up-to-date Addendum B will be helpful in answering questions pertaining to staffing. Additionally, you will need to discuss your local process for service coordination oversight and supervision, including a detailed description of how your local program ensures that EISC and EISC Supervisor credentials remain active, EISCs have access to supervision from a credentialed EISC Supervisor, and families have uninterrupted access to service coordination. Are there common topics that arise during oversight and supervision? If so, please discuss. Finally, if any credentials were inactive during the period you will need to provide detail and describe the steps that were taken to resolve the situation.

	A	B	C	D	E	F	G
1	Addendum B - EI Contact Sheet						
2	Instructions: Identify the roles and people associated with DODD EI grant agreements by completing this spreadsheet. Add additional lines as needed for service coordinators, supervisors, all evaluators and assessors, and other personnel as necessary. Please note it is possible some people's names may appear more than once. Subrecipients are required to submit revised contact sheets to their assigned EI program consultant within 14 days of any contact changes within these positions.						
3	Administrative Agency Name:						
4	Name of person completing Addendum B						
5	Date Addendum B completed						
6	County/Countries Served:						
7	Role	Name	Title/Discipline	Agency	GMS User	Admin Agent Staff, Contractor, or Other	Evaluator & Child Assessor Licensure/Certification Expiration Date(s) - (If Applicable)
8	Fiscal Agent - Head of Organization/Director						
9	Fiscal Agent- Fiscal Contact						
10	GMS User						
11	FCFC Coordinator						
12	EI Contract Manager						
13	EI Contract Manager Stand-in						
14	EIDS System Administrator						
15	EI SC Supervisor						
16	EI SC						
17	Other SC agency personnel						
18	Evaluators & Assessors						
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							

Figure 1: Addendum B EI Contact Sheet

INDIVIDUALIZED FAMILY SERVICE PLANS (IFSPs)

TIP: The EI Services and 45-Day Compliance Monitoring reports in EIDS will provide the data needed to complete the IFSP section.

In the IFSP section of the Service Coordination Oversight Report, you will need to determine how many IFSPs were completed during the reporting period, including initial, periodic, and annual IFSPs. If any initial IFSPs were not completed due to system reasons (anything other than family/child reasons), that information will need to be reported as well. The EI Services report in EIDS will provide a list of all IFSPs completed during the reporting period, while the 45-Day Compliance Monitoring report in EIDS will display NCRs for initial IFSPs not developed within the 45-day timeline. Please see Appendix C for step-by-step instructions for using the EI Services report to determine how many IFSPs were completed during the reporting period. Appendix D contains a list of EI Noncompliance Reasons (NCRs) and their applicable codes, as well as detailed instructions for using the 45-Day Compliance Monitoring Report to determine NCRs associated with missed timelines. To access the [“EI Services Report Instructions and Tips,”](#) navigate to the [Ohio EI website](#), click the “Data and Monitoring” tab, and go to “Data System”. More information on EI NCRs and examples of when each can be used can also be found on the Ohio Early Intervention website under the “Data and Monitoring” tab via “Data and Monitoring Resources”.

EI SERVICES

TIP: Use your most recent Addendum B EI Contact Sheet and the EI Services report in EIDS to help you complete this section.

In this section, you will first describe the composition of your local EI team, including identifying which employees are employed by the designated EI agency. Your most recent Addendum B (or EI Contact Sheet), submitted to DODD as part of your service coordination grant documents may be used to obtain this information (see Figure 1 above). Next, you will need to meet with your local EISCs to determine what EI service(s) is/are identified as needed, but not yet coordinated on IFSPs developed during the reporting period and how many children are waiting for an EI service to be coordinated. In addition, you

will need to describe the steps that are being taken to coordinate these services. If help is needed from your local FCFC regarding the coordination of needed EI services, please detail that in your report and discuss with local council. Ensuring that data around needed services is monitored on a regular basis is essential, as it will help to highlight potential capacity issues that need to be addressed.

The [Early Intervention Data System \(EIDS\) Data Entry Guide for Early Intervention](#) contains detailed instructions for entering services “needed, but not yet coordinated” into EIDS. This document is located on the [Ohio EI website](#) under the “Data and Monitoring” tab.

Service(s) Not Yet Coordinated

When an Early Intervention service has been identified by the IFSP team as needed to address an outcome, but that service is not yet coordinated, the “Service(s) not yet coordinated” option should be chosen from the **EI Service Type** drop down. The only other required field when choosing this option is **Service is needed to meet the following outcome(s)**. This field should be used to identify the service needed that has not yet been coordinated, as well as the outcome(s) it is needed to meet.

Please update the selected service's information.

*EI Service Type:	Service(s) not yet coordinated
*Location/Setting:	
**Service is needed to meet the following outcome(s): Note: Enter all outcomes being addressed with this service in the format "Outcome #: Outcome Text"	Special Instruction Outcome 1: Tallie will tell mom what she wants to eat at lunch time. Outcome 2: Mom and dad want to have a family story time.
**Justification is provided on the IFSP:	
Method:	
*How Often:	Times/
*Session Length:	Hours Minutes
*Provider Agency:	
*Funding Source:	

Save Service Cancel

The EI Services report in EIDS provides a list of all services listed on an IFSP, including those that have not yet been coordinated. Please note that this report includes all services listed on IFSPs in the specified timeframe, regardless of when the service was first added to the IFSP. To select only services added within the reporting period, navigate to the “IFSP Added” field and click on the filter button. Select the desired dates, then click “OK.” For example, for the reporting period of July 1-December 31, filter the “IFSP Added” field and select the months of July, August, September, October, November, and December, as shown in the screenshot below. You can then insert a pivot table or filter the data to show the needed information.

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Filter' button in the ribbon is highlighted with a red box. The 'Filter' task pane is open, showing a list of months from January to December. The 'Date Filters' section is expanded, and the months from July to December are checked. The data table below has columns for 'Start Date', 'End Date', 'Service Deliver', 'Service Locatio', and 'Non-Compliance Reason'. The 'Filter' button in the ribbon is highlighted with a red box.

Service Sessi	Start Date	End Date	Service Deliver	Service Locatio	Non-Compliance Reason
21	12/20/2021	3/10/2023		Home	
21	12/20/2021			Home	
22	8/5/2022	2/15/2023		Home	
22	9/30/2022			Home	Parent/Child Reason
22	9/30/2022			Home	Parent/Child Reason
21	6/3/2021	5/22/2023		Home	
22	11/10/2022			Home	
22	9/9/2022			Home	
22	4/14/2022	2/13/2023		Home	
22	12/5/2022	5/5/2023		Home	
21	5/14/2021			Home	
21	10/20/2021	2/4/2023		Home	
21	11/18/2021			Home	
21	11/18/2021			Home	
21	12/17/2021	4/11/2023		Home	
22	11/3/2022			Home	
22	5/24/2022	3/19/2023		Home	
22	9/15/2022	6/2/2023		Home	
22	5/10/2022			Home	
21	7/20/2021			Home	Parent/Child Reason

SOP

Please refer to your local procedure for tracking SOP data to complete this section. The EI Services report in EIDS discussed previously may also be utilized to obtain this information, as it provides a list of all IFSPs developed within the period and identifies which funding source is used for each service on the IFSP. This data will help you to determine how many SOP submissions were made during the reporting period and identify funding sources for services, including Title XX, CBDD, and/or DODD-contracted providers (SOP/POLR, hearing, vision, etc.).

OVERSIGHT

TIP: Refer to your local EI policies and procedures, as well as your SC Grant Program Narrative, and discuss your county's oversight process with your EISC Supervisors prior to completing this section.

In the oversight section, you must provide a summary describing how your local agency provides oversight of EI service coordination, EI eligibility (including via evaluation and diagnosis), and assessment activities. Your local EI policies and procedures and SC Grant Program Narrative will provide detailed information pertaining to oversight and supervision of service coordination. Additionally, you will need to describe what oversight activities have been completed during the reporting period, including correction of any DODD-issued findings of noncompliance, resolution of any Program Improvement Plans (PIPs), completion of any activities identified on your county's TA plan, observation of staff, and child record reviews. If any issues were identified during the period as a result of oversight activities, please describe how the issues are being addressed. Finally, if support is needed from your local FCFC regarding oversight, please provide details in the report and discuss with local council. Your agency's EISC Supervisors will be a helpful resource that can provide much of the detailed information to assist in answering oversight questions.

COMPLIANCE

TIP: Your most recent Baseline Compliance Memo and the Ohio EI website will be helpful in completing this section.

In the compliance section, you will need to specify which compliance indicator (45-Day, Timely Receipt of Services, or Transition) your county is participating in this fiscal year and describe what steps have been taken to prepare for the baseline process. If findings were issued during the reporting period, please indicate the compliance percentage, and describe what contributed to the finding and what steps have been taken to correct the finding. If support is needed from FCFC regarding compliance, please discuss in the report and with local council.

Ohio utilizes a rotating annual monitoring schedule in which county programs participate in one of three baseline compliance indicators - 45-Day, Timely Receipt of Services (TRS), or Transition (including Transition Steps and Services and TPC) analysis. This schedule ensures that all counties have data analyzed for each of these compliance indicators within a three-year period.

Each year, DODD assigns all counties to participate in one of the three baseline compliance indicators. Emails are sent to Contract Managers and FCFC Coordinators to notify them of which compliance indicator they have been assigned. The email contains a chart showing the three baseline compliance indicator groups and specifies which counties are assigned to each. Webinars providing in-depth information on each indicator are held annually prior to the baseline process. Memos containing compliance results and feedback are then emailed to county contacts following the applicable analysis. You may use this memo to answer the questions in the compliance section of the report.

More information on the Ohio Baseline Compliance Analysis Process and the most recent [Baseline Calendar](#) can be found on the [Ohio EI website](#).

TRANSITION AND LEA REPORTING

TIP: Refer to your most recent Interagency Agreement (IAA), locally maintained copies of LEA reports, and LEA compliance memos to complete this section.

In this section of the report, you will discuss your transition and LEA reporting process. First, you will need to identify when your last LEA report was run. Quarterly LEA reports are required to be run and sent to the appropriate LEA by the first of February, May, August, and November. Please refer to your local process for obtaining this information. If LEA reports are sent via email to the appropriate LEA, you may check your sent emails to obtain the date the last LEA report was sent. Notification to the LEA is monitored for every county annually. A copy of the February Quarterly LEA report is submitted to DODD and used for compliance monitoring. Memos are then issued to each county with their compliance results. Your most recent LEA memo may also be a helpful resource in completing this section.

Next, you will provide information regarding when your Interagency Agreement (IAA) was last completed and when it is scheduled to be reviewed and/or updated. Local EI programs are required to update their Interagency Agreement on an annual basis, at a minimum. If your local agency has encountered any challenges during the reporting period with the implementation of your IAA, please summarize.

Finally, you will need to provide your county's status in participating in [OCALI's "C to B Transition" training](#). If your county has participated, please identify when the training was completed, who participated, and discuss the results of the training. If your county has not yet completed the training, it is strongly recommended that you register and participate. If support or assistance is

needed from the FCFC regarding transition and/or LEA reporting, please discuss.

COMPLAINTS OR FOCUSED MONITORING

Please refer to your local designated EI agency's policies and procedures regarding complaints and focused monitoring to complete this section.

COUNTY DETERMINATION

TIP: County APR Determinations can be located on the Ohio EI website under the Data and Monitoring Tab.

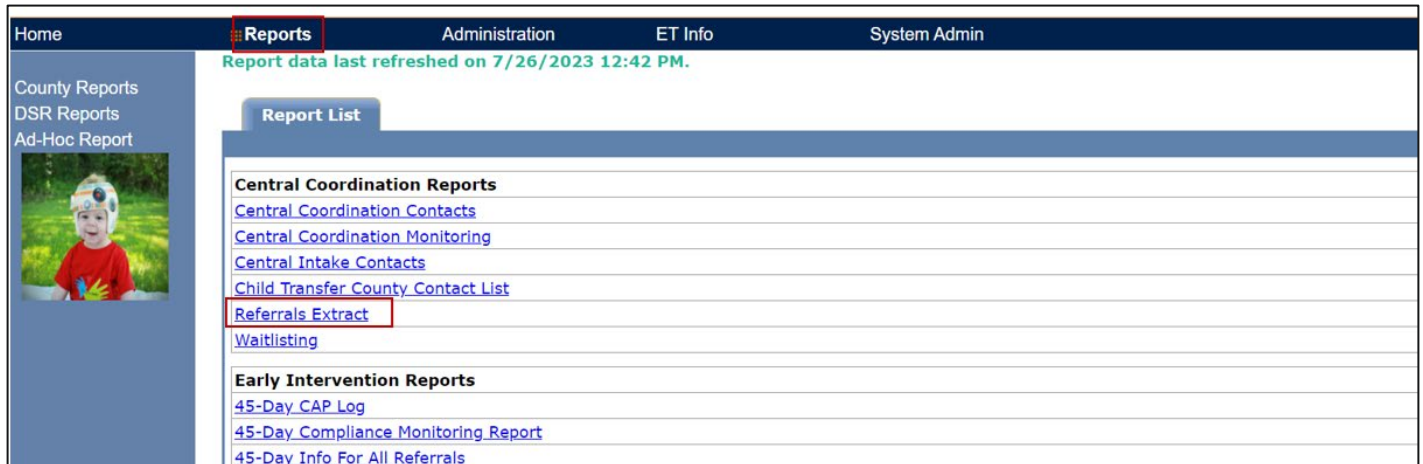
Each Spring, DODD sends out county APR and determinations reports and memos to Contract Managers and FCFC Coordinators via email. The information is later uploaded to the EI website for future reference. To locate your county's determination, visit the Ohio EI website at www.ohioearlyintervention.org/county-data. See Appendix E for detailed instructions for accessing your county's APR determinations.

For additional questions regarding the instructions in this guide or obtaining your County's data from EIDS reports, please contact Erin Hale by emailing Erin.Hale@childrenandyouth.ohio.gov. For program related questions, please contact your designated EI Program Consultant. The following link may be used to access the most up-to-date version of the EI Program Consultant map <https://ohioearlyintervention.org/technical-assistance-team>

APPENDIX A: DETERMINING TOTAL NUMBER OF REFERRALS AND NUMBER OF REFERRALS RECEIVED FROM VARIOUS SOURCES

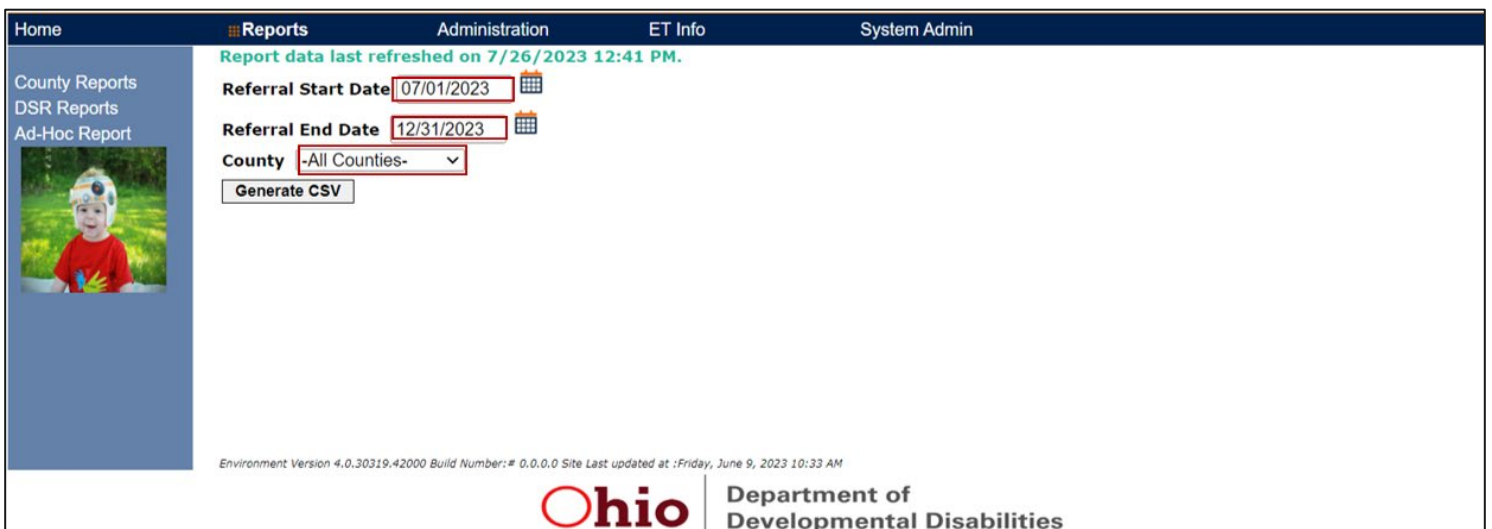
Step 1: Go to EIDS, click on “Reports” tab

Step 2: Select “Referrals Extract” under “Central Coordination Reports”



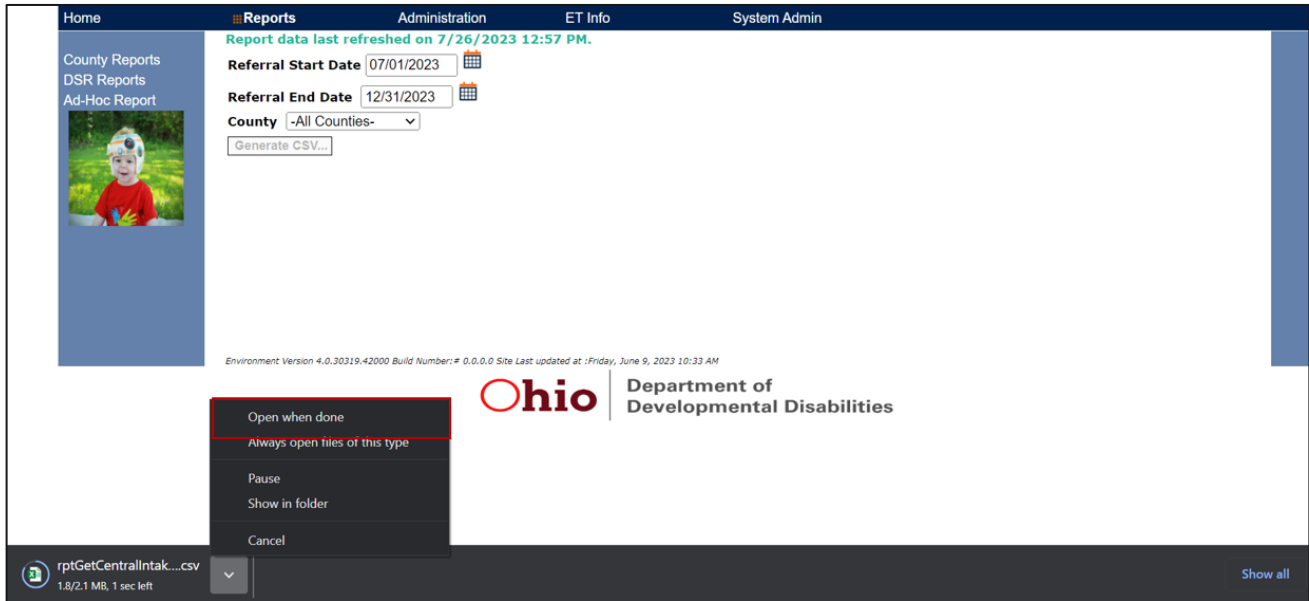
The screenshot shows the EIDS Reports page. The navigation bar includes Home, Reports (highlighted), Administration, ET Info, and System Admin. A status message indicates "Report data last refreshed on 7/26/2023 12:42 PM." The left sidebar lists County Reports, DSR Reports, and Ad-Hoc Report, with a small image of a child. The main content area is titled "Report List" and contains two sections: "Central Coordination Reports" and "Early Intervention Reports". Under "Central Coordination Reports", the following links are listed: Central Coordination Contacts, Central Coordination Monitoring, Central Intake Contacts, Child Transfer County Contact List, Referrals Extract (highlighted with a red box), and Waitlisting. Under "Early Intervention Reports", the following links are listed: 45-Day CAP Log, 45-Day Compliance Monitoring Report, and 45-Day Info For All Referrals.

Step 3: Enter start and end dates for reporting period, select your county from dropdown box, click “Generate CSV”

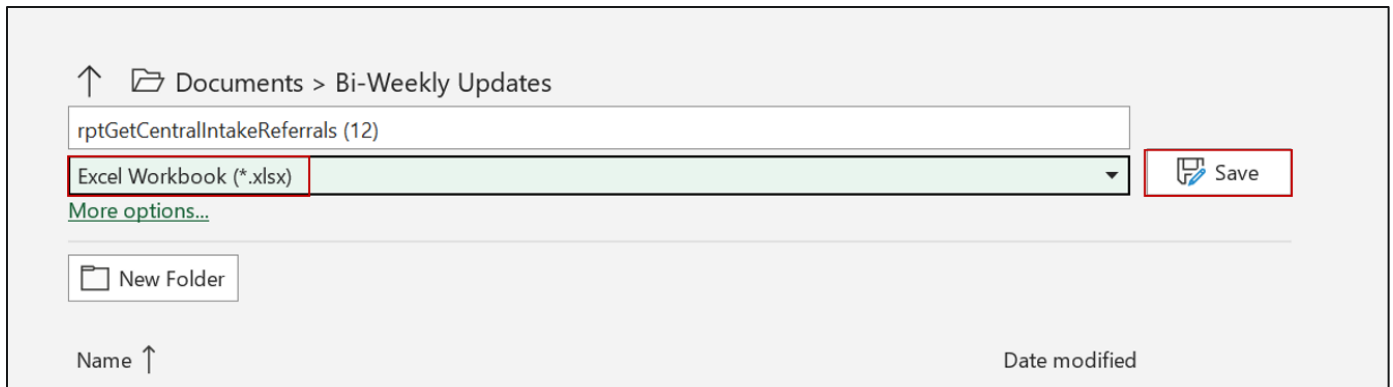


The screenshot shows the EIDS Reports page with the date selection and county dropdown options. The navigation bar includes Home, Reports (highlighted), Administration, ET Info, and System Admin. A status message indicates "Report data last refreshed on 7/26/2023 12:41 PM." The left sidebar lists County Reports, DSR Reports, and Ad-Hoc Report, with a small image of a child. The main content area contains the following fields: "Referral Start Date" with a date input field containing "07/01/2023" and a calendar icon; "Referral End Date" with a date input field containing "12/31/2023" and a calendar icon; "County" with a dropdown menu showing "-All Counties-"; and a "Generate CSV" button. At the bottom of the page, the text "Environment Version 4.0.30319.42000 Build Number:# 0.0.0.0 Site Last updated at :Friday, June 9, 2023 10:33 AM" is displayed, along with the Ohio Department of Developmental Disabilities logo.

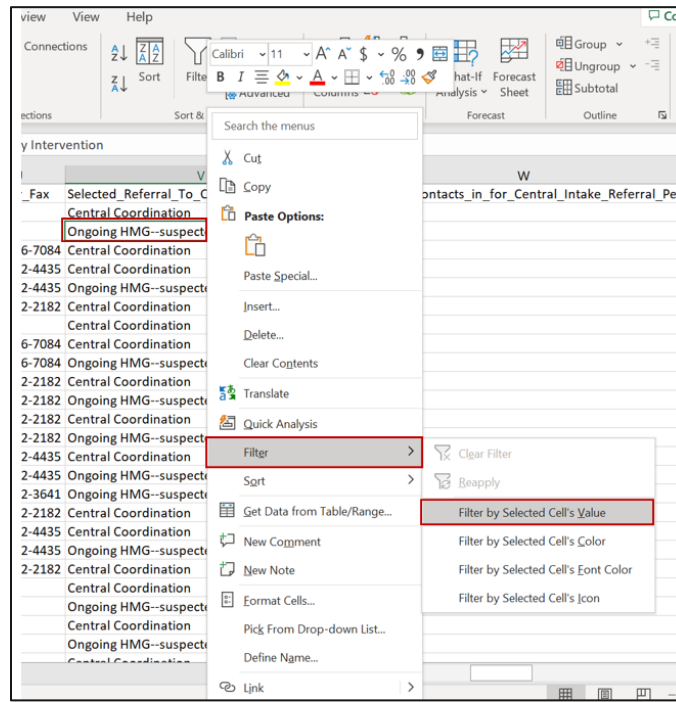
Step 4: When the report has downloaded, click “Open”



Step 5: To utilize all functionality, save the file as an Excel file by clicking “Save As” and selecting the desired location. Type in the file name and select “Excel Workbook” in the “Save as type” field. Then press “Save”



Step 6: Open spreadsheet, go to any cell within “Selected_Referrals_To_Category” column that contains “Ongoing HMG -- Suspected EI,” right click, go to filter, select “Filter by Selected Cell’s Value”. This will filter the data to display only EI referrals



Step 7: Highlight column D with “ETId” and Column K with “Selected_Referral_Source_Type” (hold down Ctrl key to highlight both columns), click Ctrl+C to copy

The screenshot shows the Excel spreadsheet with columns D and K highlighted in red. Column D is labeled 'ETId' and column K is labeled 'Selected_Referral_Source_Type'. A box with the text 'Copy CTRL+C' is overlaid on the spreadsheet. The spreadsheet data is as follows:

	A	B	C	D	E	F	G	H	I	J	K	
	County	Child_Last_Name	Child_First_Name	ETId	Birth_Date	Due_Date	Sex	Race_s	Ethnicity	Referral_Date	Selected_Referral_Source_Type	Sele
1				636			Male	White Black or African American	Non-Hispanic	7/13/2022	EI 8045	Han
2							Male	White Black or African American	Non-Hispanic	7/13/2022	EI 8045	Han
3							Male	White	Non-Hispanic	7/12/2022	Parent	
4							Male	White	Non-Hispanic	7/12/2022	Parent	
5							Female	White	Non-Hispanic	7/1/2022	WIC	Han
6							Female	White	Non-Hispanic	7/1/2022	WIC	Han
7					12/6/2020		Male	White	Non-Hispanic	7/13/2022	ODH?OCCSN	Ohic
8					12/6/2020		Male	White	Non-Hispanic	7/19/2022	ODH?OCCSN	Ohic
9							Female	White	Non-Hispanic	7/11/2022	EI 8045	Han
10							Female	White	Non-Hispanic	7/11/2022	EI 8045	Han
11							Male	White	Hispanic	12/1/2022	Physician	Caug
12							Male	White	Hispanic	12/1/2022	Physician	Caug
13							Female	White	Hispanic	10/27/2022	Local Health Department	Han
14							Female	White	Hispanic	11/3/2022	Local Health Department	Han
15							Male	White	Non-Hispanic	10/20/2022	Physician	Fam
16							Male	White	Non-Hispanic	10/26/2022	Physician	Fam
17							Male	White	Non-Hispanic	11/23/2022	Parent	
18							Male	White	Non-Hispanic	11/23/2022	Parent	
19							Female			7/1/2022	WIC	Han
20							Female			7/1/2022	WIC	Han
21							Male			10/13/2022	Parent	
22							Male			10/13/2022	Parent	
23							Female			8/12/2022	Local Child Find Specialist	Mat

Step 8: Open new worksheet, go to cell A1, click Ctrl+V to paste copied columns

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The worksheet contains the following data in column A:

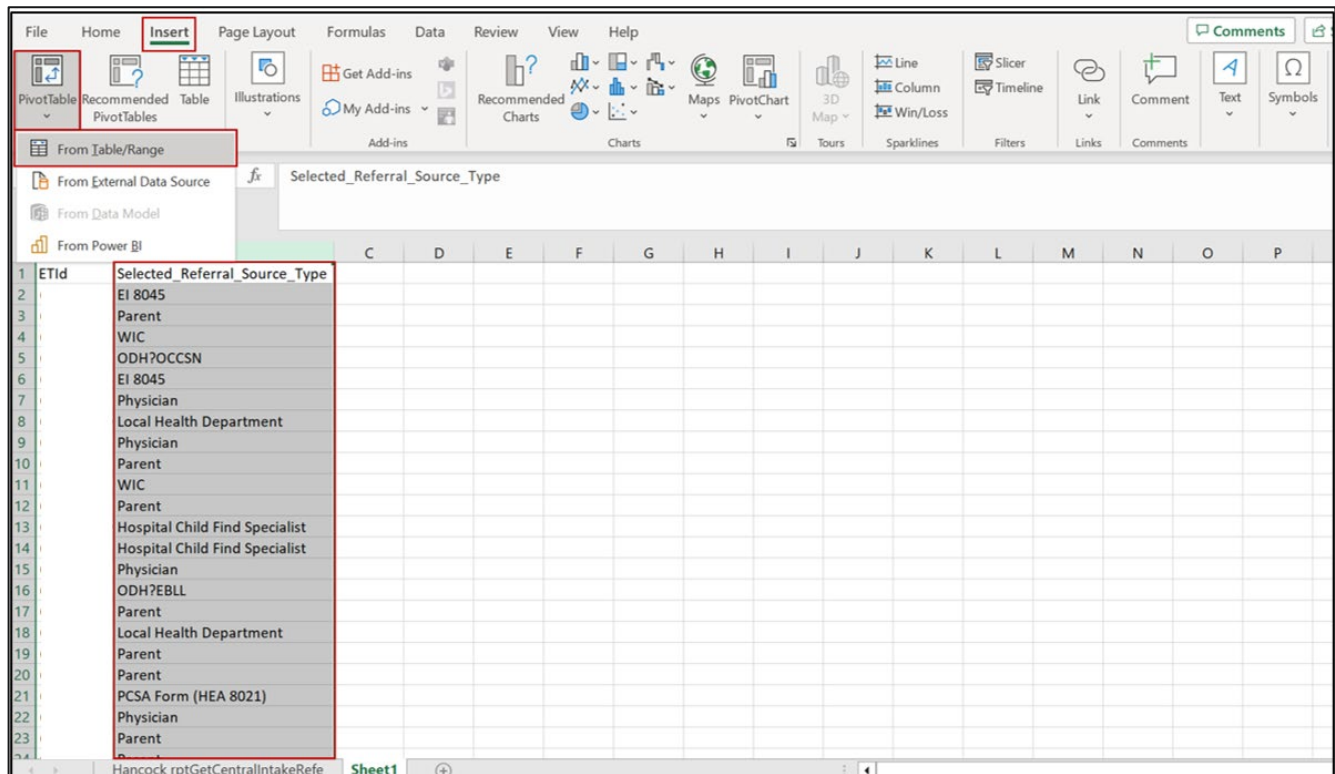
ETId	Selected_Referral_Source_Type
EI 8045	
EI 8045	
Parent	
Parent	
WIC	
WIC	
ODH?OCCSN	
ODH?OCCSN	
EI 8045	
EI 8045	
Physician	
Physician	
Local Health Department	
Local Health Department	
Physician	
Physician	
Parent	
Parent	
WIC	
WIC	
Parent	
Parent	

Step 9: Next, go to “Data” tab, and click “Remove Duplicates”; When “Remove Duplicates” box pops up, ensure that both “ETId” and “Referral Source Name” columns are selected, and click “OK”. (A pop up should tell you how many blank cells, if any, have been replaced)

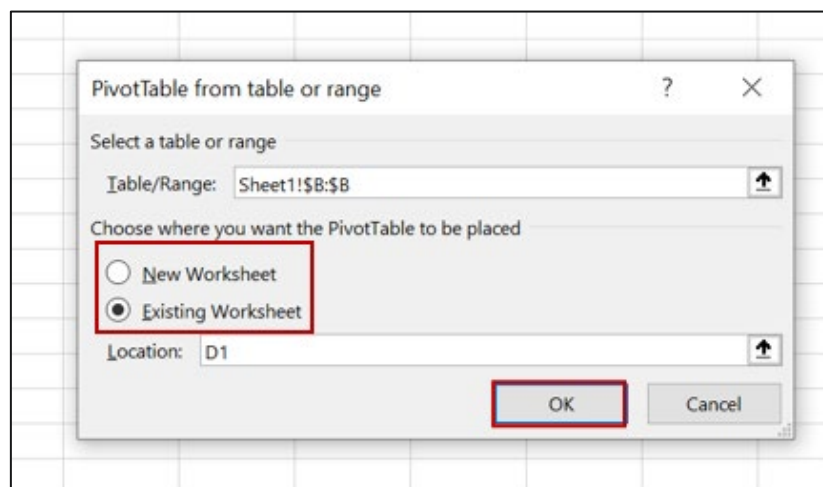
The screenshot shows the 'Remove Duplicates' dialog box open over the Excel worksheet. The dialog box contains the following information:

- Title: Remove Duplicates
- Message: To delete duplicate values, select one or more columns that contain duplicates.
- Buttons: Select All, Unselect All, My data has headers (checked)
- Columns list:
 - ETId
 - Selected_Referral_Source_Type
- Buttons: OK, Cancel

Step 10: Highlight column with “Selected_Referral_Source_Type,” go to “Insert” tab, and insert Pivot Table “From Table/Range”



Step 11: Insert Pivot Table (you can insert on the same worksheet or a new one - if you opt to insert on the same worksheet, you will need to specify the location)



Step 12: Drag “Selected_Referral_Source_Type” to “Rows” and “Values” (*The pivot table field name depends on the data- in this example below, “EI 8045” is displayed; however, your table may show a different name)

The screenshot displays an Excel PivotTable with the following data:

Referral Source (Column D)	Count of EI 8045 (Column F)
Child Care	1
EI 8045	6
Hospital	9
Hospital Child Find Specialist	9
Local Health Department	8
Nonprofit Community Provider	10
ODH?EBLL	1
ODH?OCCSN	3
Parent	58
PCSA Form (HEA 8021)	16
Physician	18
State Health Department	3
Transferred from County HMG	4
WIC	8
(blank)	
Grand Total	154

The PivotTable Fields task pane on the right shows:

- Rows:** EI 8045
- Values:** Count of EI 8045

Annotations in the image include:

- A red box around the 'Grand Total' cell (154) with the text "Total # of referrals".
- A red box around the 'Count of EI 8045' field in the Values area with the text "# of referrals from each referral source".

*It is important to note that pivot table data is determined by the referrals received during the reporting period. If referral sources are not listed, it means there were no referrals from that specific referral source during the period and you can mark “0” next to that source in the report template table.

APPENDIX B: IDENTIFYING NUMBER OF REFERRALS DETERMINED ELIGIBLE, NUMBER OF EVALUATIONS COMPLETED, AND NUMBER OF REFERRALS WITH AN IFSP COMPLETED

Step 1: Go to EIDS, click “Reports,” and select “45-Day Compliance Monitoring Report”.

The screenshot shows the EIDS web application interface. At the top, there is a navigation bar with 'Home', 'Reports', 'Administration', 'ET Info', and 'System Admin'. Below the navigation bar, a message states 'Report data last refreshed on 6/2/2023 10:57 AM.' The main content area is titled 'Report List' and contains two sections: 'Central Coordination Reports' and 'Early Intervention Reports'. Under 'Early Intervention Reports', the '45-Day Compliance Monitoring Report' is highlighted with a red box. Other reports listed include '45-Day CAP Log', '45-Day Info For All Referrals', 'Active Service Coordinator', and 'CAPTA Report'.

Step 2: Select your county from the dropdown box, select “45-day Timeline Ends,” enter the beginning and ending dates of the reporting period, choose “Data Extract,” and click “Get Report.”

The screenshot shows the '45-Day Compliance Monitoring Report' form. The form includes several dropdown menus and radio buttons. The 'County' is set to 'Marion', 'Contract' to 'Early Intervention (Marion County Early Intr', 'Agency' to 'ALL', and 'Worker' is empty. The '*Date Option*' is set to '45-Day Timeline Ends' (highlighted in red). The '*Report Start Date*' is '07/01/2022' and the '*Report End Date*' is '12/31/2022'. The '*Report Type*' is set to 'Data Extract' (highlighted in red). The '*Report Format*' is 'EXCEL'. A 'Get Report...' button is located in the top right corner and is also highlighted in red. At the bottom, there is a footer with the Ohio Department of Developmental Disabilities logo and version information.

*To utilize all functionality, save the file as an Excel file by clicking “Save As” and selecting the desired location. Type in the file name and select “Excel Workbook” in the “Save as type” field. Then press “Save” (see step 5 from Appendix A)

Step 3: Once the worksheet is opened, go to column Q “Exit Reason”, click “Find & Select” and select “Replace...”

The screenshot displays the Microsoft Excel interface with a data table. The 'Find & Select' menu is open on the right side, with the 'Replace...' option highlighted. The data table contains the following information:

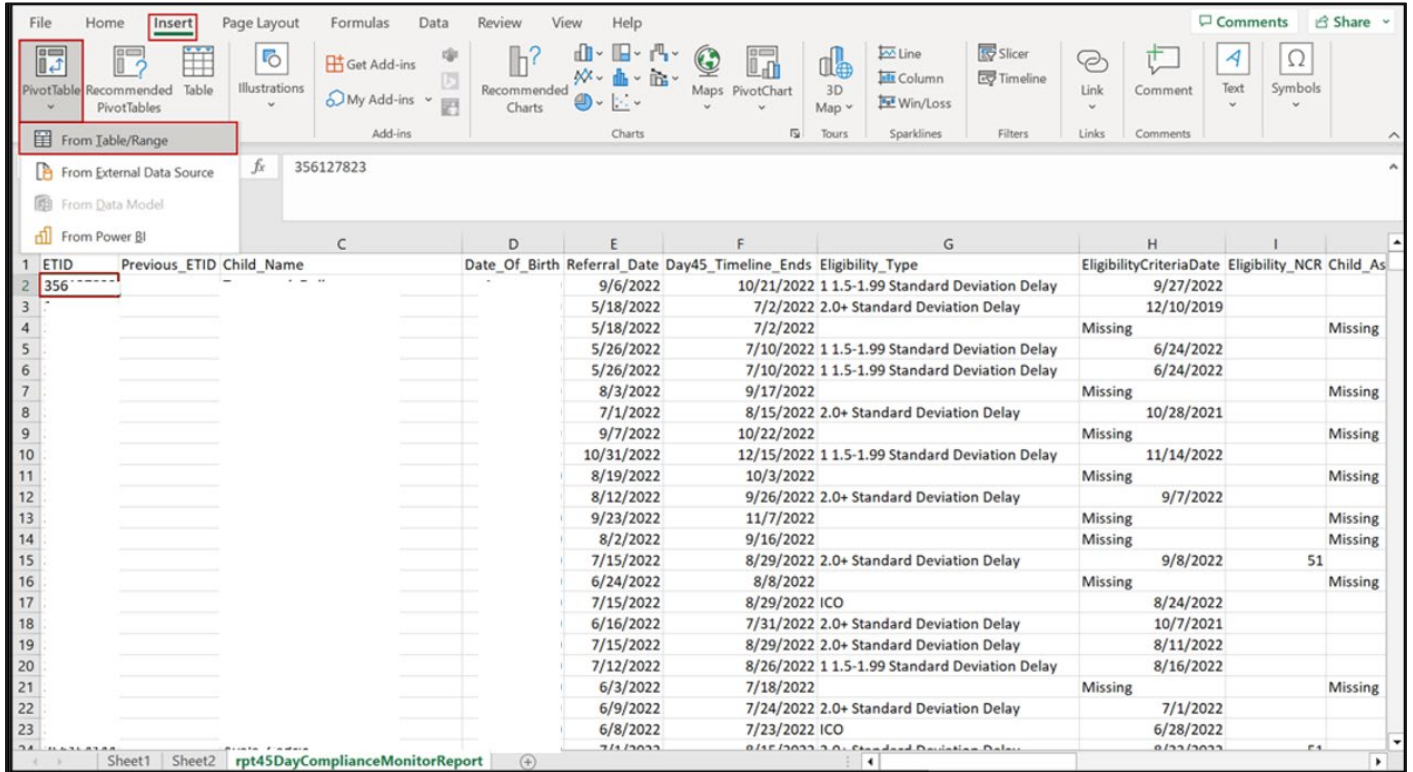
Family_Assessment_NCR	IFSP_Date	IFSP_NCR	Exit_Date	Exit_Reason	Exit_Destination	Service
	Missing		11/12/2022	Family refused program requirements	Home	
	7/15/2022	51	10/17/2022	Reached Age 3, Part B eligibility not determined	Home	
	Missing		7/21/2022	Child/Family not eligible	No Destination Identified	
	7/6/2022		11/14/2022	Reached Age 3, Part B Eligible	Public Preschool	
	7/6/2022		11/14/2022	Reached Age 3, Part B Eligible	Public Preschool	
	Missing		10/11/2022	Family no longer interested	No Destination Identified	
	Missing		8/30/2022	Family refused program requirements	Home	
	Missing		11/15/2022	Family no longer interested	Home	
	11/29/2022		12/31/2022	Reached Age 3, Not Eligible for Part B, exit with no referral	Home	
	Missing		10/22/2022	Unable to contact family	No Destination Identified	
	9/21/2022		11/19/2022	Reached Age 3, Part B Eligible	Public Preschool	
	Missing		1/4/2023	Family no longer interested	Public Preschool	
	Missing		10/30/2022	Child/Family not eligible	No Destination Identified	
	51	9/19/2022	51	11/5/2022	Family no longer interested	Home
	Missing		8/22/2022	Unable to contact family	No Destination Identified	
	9/7/2022	51	2/19/2023	Reached Age 3, Part B Eligible	No Destination Identified	
	9/15/2022	51	3/30/2023	Reached Age 3, Part B Eligible	Public Preschool	
	8/24/2022		4/20/2023	Reached Age 3, Part B Eligible	Public Preschool	
	8/23/2022		4/14/2023	Reached Age 3, Part B Eligible	Public Preschool	
	Missing		10/11/2022	Family no longer interested	Home	
	7/20/2022		10/26/2022	Reached Age 3, Not Eligible for Part B, exit to other program	Child Care Center	
	7/25/2022	51	11/3/2022	Loss of contact with family	No Destination Identified	

Step 4: When the Find and Replace box pops up, leave “Find what” box blank and type “Not yet exited” in the “Replace with” box; Click “Replace All” (If done correctly, a pop up should tell you how many blank cells have been replaced)

The screenshot shows an Excel spreadsheet with a 'Find and Replace' dialog box open. The spreadsheet has columns M through R. Column M is 'Family_Assessment_NCR', N is 'IFSP_Date', O is 'IFSP_NCR', P is 'Exit_Date', Q is 'Exit_Reason', and R is 'Exit_Destination'. The dialog box is positioned over the data, with 'Find what' empty and 'Replace with' containing 'Not Yet Exited'. The 'Replace All' button is highlighted with a red box. The spreadsheet data includes various exit reasons and destinations.

M	N	O	P	Q	R
Family_Assessment_NCR	IFSP_Date	IFSP_NCR	Exit_Date	Exit_Reason	Exit_Destination
	Missing		11/12/2022	Family refused program requirements	Home
	7/15/2022	51	10/17/2022	Reached Age 3, Part B eligibility not determined	Home
	Missing		7/21/2022	Find and Replace	Destination Identified
	7/6/2022		11/14/2022		Public Preschool
	7/6/2022		11/14/2022		Public Preschool
	Missing		10/11/2022		Destination Identified
	Missing		8/30/2022		ne
	Missing		11/15/2022		ne
	11/29/2022		12/31/2022		ne
	Missing		10/22/2022		Destination Identified
	9/21/2022		11/19/2022		Public Preschool
	Missing		1/4/2023		Public Preschool
	Missing		10/30/2022		Destination Identified
51	9/19/2022	51	11/5/2022		ne
	Missing		8/22/2022		Destination Identified
	9/7/2022	51	2/19/2023	Reached Age 3, Part B Eligible	No Destination Identified
	9/15/2022	51	3/30/2023	Reached Age 3, Part B Eligible	Public Preschool
	8/24/2022		4/20/2023	Reached Age 3, Part B Eligible	Public Preschool
	8/23/2022		4/14/2023	Reached Age 3, Part B Eligible	Public Preschool
	Missing		10/11/2022	Family no longer interested	Home
	7/20/2022		10/26/2022	Reached Age 3, Not Eligible for Part B, exit to other program	Child Care Center
	7/25/2022	51	11/3/2022	Loss of contact with family	No Destination Identified
	8/6/2022	51	5/20/2022	Reached Age 3, Part B Eligible	Public Preschool

Step 5: Go to cell A2, insert pivot table “From Table/Range” (*Make sure entire worksheet is highlighted/selected); Click “OK” to insert pivot tab to new worksheet



Step 6: Open worksheet containing inserted pivot table; Drag “Referral_Date” to Values field

The screenshot displays the Microsoft Excel interface. The PivotTable is located in cell A3 and contains the following data:

Count of Referral_Date
1322

The PivotTable Fields task pane on the right side of the screen shows the following configuration:

- Choose fields to add to report: Search
- Fields list: ETID, Previous_ETID, Child_Name, Date_Of_Birth, Referral_Date, Dav45_Timeline_Perds
- Drag fields between areas below:
 - Filters: (empty)
 - Columns: (empty)
 - Rows: (empty)
 - Values: Σ Values, Count of Referral_Date
- Defer Layout Update:
- Update: (button)

The table will now display the *total number of referrals with a 45-day timeline ending during the reporting period.*

Step 7: Copy pivot table using CTRL+C, paste to new cell using CTRL+V; Drag “Referral_Date” back to top with other fields

The screenshot shows the Excel interface with the PivotTable Fields task pane. The PivotTable is located in cells A3:A8, with 'Count of Referral_Date' in column B. The PivotTable Fields task pane on the right shows 'Referral_Date' selected in the Values area. A red box highlights 'Count of Referral_Date' in the Values area, and a red arrow points from 'Referral_Date' in the field list to the Values area.

Count of Referral_Date
1322
Count of Referral_Date
1322

Step 8: Next, drag “Eligibility_Type” to Rows and Values

The screenshot shows the Excel interface with the PivotTable Fields task pane. The PivotTable is located in cells A7:A16, with 'Row Labels' in column A and 'Count of Eligibility_Type' in column B. The PivotTable Fields task pane on the right shows 'Eligibility_Type' selected in both the Rows and Values areas. Red boxes highlight 'Eligibility_Type' in both areas, and red arrows point from 'Eligibility_Type' in the field list to both areas.

Row Labels	Count of Eligibility_Type
1 1.5-1.99 Standard Deviation Delay	104
2 2.0+ Standard Deviation Delay	348
3 2+ 1.5-1.99 Standard Deviation Delays	20
4 Dx on Form	71
5 Dx on List	133
6 ICO	313
7 Not Eligible (blank)	65
8 Grand Total	1054

Step 9: Click on filter beside “Row Labels”, unselect “Not Eligible” and “(blank)”, click “OK”.

The screenshot shows the Microsoft Excel interface with the PivotTable Fields task pane on the right and a filter dropdown menu open for the 'Row Labels' field. The task pane shows 'Eligibility_Type' selected in the Filters area and 'Count of Eligibility_Type' in the Values area. The filter dropdown menu for 'Row Labels' is open, showing a list of categories with checkboxes. The 'Not Eligible' and '(blank)' categories are highlighted with a red box, indicating they are to be unselected. The 'OK' button is also highlighted with a red box.

Row Labels	Count of Referral_Date
1.5-1.99 Standard Deviation Delay	1322
2.0+ Standard Deviation Delay	
2+ 1.5-1.99 Standard Deviation Delays	
Dx on Form	
Dx on List	
ICO	
Not Eligible	
(blank)	
Grand Total	

The pivot table now displays the *total number of referrals with a 45-day timeline ending during the period who were determined eligible.*

Step 10: To display only referrals who were determined eligible via evaluation, copy pivot table using CTRL+C and paste in cell below using CTRL+V (*leave 2-3 empty rows in between copy/pasted tables)

Count of Referral_Date	
	1322
Row Labels	Count of Eligibility_Type
1 1.5-1.99 Standard Deviation Delay	104
2.0+ Standard Deviation Delay	348
2+ 1.5-1.99 Standard Deviation Delays	20
Dx on Form	71
Dx on List	133
ICO	313
Grand Total	989
Row Labels	Count of Eligibility_Type
1 1.5-1.99 Standard Deviation Delay	104
2.0+ Standard Deviation Delay	348
2+ 1.5-1.99 Standard Deviation Delays	20
Dx on Form	71
Dx on List	133
ICO	313
Grand Total	989

Total Eligible (Evaluation & DX)

Step 11: In the pasted pivot table, click on the filter beside “Row Labels”, unselect “Dx on List” and “Dx on Form”, click “OK”

The screenshot shows the Excel interface with the PivotTable Fields task pane on the right. The 'Row Labels' filter list is expanded, showing the following items:

- (Select All)
- 1 1.5-1.99 Standard Deviation Delay
- 2.0+ Standard Deviation Delay
- 2+ 1.5-1.99 Standard Deviation Delays
- Dx on Form
- Dx on List
- ICO
- Not Eligible
- (blank)

The 'OK' button is highlighted with a red box. The PivotTable Fields task pane shows 'Eligibility_Type' in the Rows area and 'Count of Eligibility_Type' in the Values area.

Row Labels	Count of Eligibility_Type
1.5-1.99 Standard Deviation Delay	104
2.0+ Standard Deviation Delay	348
2+ 1.5-1.99 Standard Deviation Delays	20
Dx on Form	72
Dx on List	132
ICO	308
Grand Total	984

The screenshot shows the Excel interface with a pivot table. The pivot table has two filters: 'Referral Date' and 'Eligibility Type'. The 'Referral Date' filter is set to 'Total # of referrals w/ 45-day timeline ending during reporting period' with a value of 1322. The 'Eligibility Type' filter is set to 'Total Eligible' with a value of 989. The total eligible is 785.

Row Labels	Count of Eligibility_Type
1.5-1.99 Standard Deviation Delay	104
2.0+ Standard Deviation Delay	348
2+ 1.5-1.99 Standard Deviation Delays	20
Dx on Form	71
Dx on List	133
ICO	313
Grand Total	989

Total Eligible: 989

Row Labels	Count of Eligibility_Type
1.5-1.99 Standard Deviation Delay	104
2.0+ Standard Deviation Delay	348
2+ 1.5-1.99 Standard Deviation Delays	20
ICO	313
Grand Total	785

Total Eligible via Evaluation: 785

The table will now display the *total number of referrals with a 45-day timeline ending during the reporting period who were determined eligible via evaluation*. (*Please note that these are only evaluations conducted on new referrals and data does not include evaluations conducted as part of annual redetermination)

Step 12: To determine how many of referrals were eligible and had an IFSP completed, copy pivot table showing the total number of referrals determined eligible (including via evaluation and dx) using CTRL+C and paste to new cell using CTRL+V (Leave 2-3 empty rows between copy/pasted pivot tables)

Step 13: In the pasted pivot table, drag “Eligibility_Type” from Rows to Filters and drag “IFSP_Date” to Filters and Values

The screenshot displays the Microsoft Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is titled "Count of Eligibility_Type" and shows a grand total of 785. The PivotTable Fields task pane shows "Eligibility_Type" moved from the Rows area to the Filters area.

Row Labels	Count of Eligibility_Type
1 1.5-1.99 Standard Dev	104
2 2.0+ Standard Deviation I	348
2+ 1.5-1.99 Standard Dev	20
ICO	313
Grand Total	785

The PivotTable Fields task pane shows the following fields:

- ETID
- Previous_ETID
- Child_Name
- Date_Of_Birth
- Referral_Date
- Day45_Timeline_Ends
- Eligibility_Type** (checked)

The task pane also shows the following areas:

- Filters:** Eligibility_Type
- Columns:**
- Rows:**
- Values:** Count of Eligibility_Type

The screenshot displays the Microsoft Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is titled "Count of Eligibility_Type" and is located in the range A18:K27. The task pane on the right shows the "PivotTable Fields" task pane with the following fields:

- Family_Assessment_Date
- Family_Assessment_NCR
- IFSP_Date
- IFSP_NCR
- Exit_Date
- Exit_Reason

The "Filters" section contains:

- Eligibility_Type
- IFSP_Date

The "Values" section contains:

- Count of Eligibility_Type

The PivotTable data is as follows:

Row Labels	Count of Eligibility_Type
1 1.5-1.99 Standard Dev	104
2 2.0+ Standard Deviation I	348
2+ 1.5-1.99 Standard Dev	20
ICO	313
Grand Total	785

A red box highlights the "IFSP_Date" field in the task pane, and a red arrow points from it to the "IFSP_Date" field in the "Filters" section. A red box also highlights the "Total Eligible via Evaluation" text in cell C23.

Step 14: Next, go to filter beside “Eligibility_Type” and unselect “Not Eligible” and “blank”

The screenshot shows the Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is titled "Count of Eligibility_Type" and has the following data:

Row Labels	Count of Eligibility_Type
1.5-1.99 Standard Dev	104
2.0+ Standard Deviation I	348
2+ 1.5-1.99 Standard Dev	20
ICO	313
Grand Total	785

The PivotTable Fields task pane shows the following configuration:

- Choose fields to add to report: IFSP_Date (checked)
- Filters: Eligibility_Type, IFSP_Date
- Columns: (empty)
- Rows: (empty)
- Values: Count of Eligibility_Type

The PivotTable Fields task pane also shows the following options:

- Family_Assessment_Date (unchecked)
- Family_Assessment_NCR (unchecked)
- IFSP_Date (checked)
- IFSP_NCR (unchecked)
- Exit_Date (unchecked)
- Exit_Reason (unchecked)

The PivotTable Fields task pane also shows the following options:

- Not Eligible (unchecked)
- (blank) (unchecked)

The PivotTable Fields task pane also shows the following options:

- OK (checked)
- Cancel

Step 15: Go to filter beside “IFSP_Date” and unselect “missing” and “blank” (you may have to scroll to the end to unselect “blank”)

The screenshot shows the Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is titled "Count of Eligibility_Type" and has the following data:

Row Labels	Count of Eligibility_Type
1.5-1.99 Standard Dev	104
2.0+ Standard Deviation I	348
2+ 1.5-1.99 Standard Dev	20
ICO	313
Grand Total	785

The PivotTable Fields task pane shows the following configuration:

- Choose fields to add to report: IFSP_Date (checked)
- Filters: Eligibility_Type, IFSP_Date
- Columns: (empty)
- Rows: (empty)
- Values: Count of Eligibility_Type

The PivotTable Fields task pane also shows the following options:

- Family_Assessment_Date (unchecked)
- Family_Assessment_NCR (unchecked)
- IFSP_Date (checked)
- IFSP_NCR (unchecked)
- Exit_Date (unchecked)
- Exit_Reason (unchecked)

The PivotTable Fields task pane also shows the following options:

- Missing (unchecked)

The PivotTable Fields task pane also shows the following options:

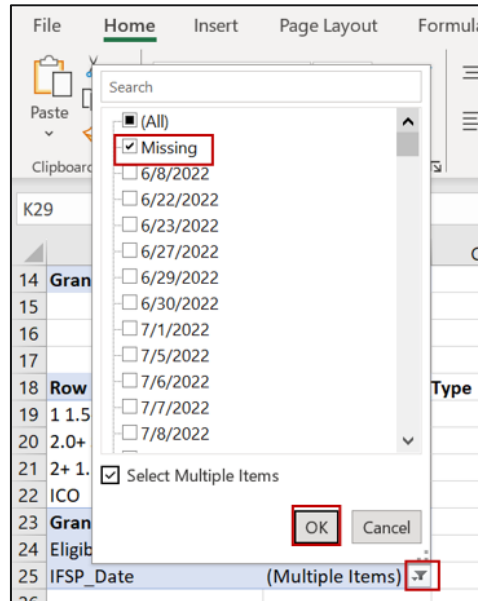
- OK (checked)
- Cancel

Row Labels	Count of Eligibility_Type	
1.5-1.99 Standard Deviz	104	
2.0+ Standard Deviation I	348	
2+ 1.5-1.99 Standard Dev	20	
ICO	313	
Grand Total	785	Total Eligible via Evaluation
Eligibility_Type	(Multiple Items)	
IFSP_Date	(Multiple Items)	
Count of Eligibility_Type	861	Total Eligible w/ IFSP

The screenshot shows the Excel ribbon with the PivotTable Tools contextual tabs (PivotTable Design and PivotTable Layout) active. The PivotTable is set to show the count of eligibility types, filtered by IFSP completion date. The grand total for the pivot table is 861, which is highlighted in a red box. The overall grand total for the data source is 785, also highlighted in a red box.

The pivot table now displays the *total number of referrals with a 45-day timeline ending during the period who were eligible and had an IFSP completed.*

Step 16: To determine the number of referrals who were eligible, but did *not* have a completed IFSP, go back to the “IFSP_Date” filter and select only “missing” and “blank”; Click “OK”



This shows the *total number of referrals with a 45-day timeline ending during the period who were determined eligible but did not have an IFSP completed.*

Row	Label	Count	Notes
14	Grand Total	989	Total Eligible
18	Row Labels	Count of Eligibility_Type	
19	1.5-1.99 Standard Deviz	104	
20	2.0+ Standard Deviation I	348	
21	2+ 1.5-1.99 Standard Dev	20	
22	ICO	313	
23	Grand Total	785	Total Eligible via Evaluation
24	Eligibility_Type	(Multiple Items)	
25	IFSP_Date	(Multiple Items)	
27	Count of Eligibility_Type	128	Total Eligible w/o IFSP

Total Eligible - 989

Total Eligible w/ IFSP – 861

Total Eligible w/o IFSP – 128

To check your data, the sum of referrals eligible with and without a completed IFSP should equal the total eligible

$861+128= 989$

* The total of referrals with and without a completed IFSP should equal the total number of referrals determined eligible

Step 17: To look at the exit reasons for referrals who were determined eligible but did not have an IFSP completed, click filter beside “IFSP_Date” pivot table, ensure only “missing” and “blank” are selected, drag “Exit_Reason” to Rows and Values

The screenshot shows the Microsoft Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is located in the range A27:C37 and displays the following data:

Row Labels	Count of Eligibility_Type	Count of Exit_Reason
Child screened and not suspected of having a disability	1	1
Child transitioned to part B services with an IEP prior to three years of age	2	2
Child/Family not eligible	8	8
Family moved out of contractor's geography within state	1	1
Family no longer interested	37	37
Family refused program requirements	6	6
Loss of contact with family	2	2
No need for IFSP outcomes at this time	13	13
Unable to contact family	58	58
Grand Total	128	128

The PivotTable Fields task pane on the right shows the following configuration:

- Filters:** Eligibility_Type, IFSP_Date
- Columns:** Values
- Rows:** Exit_Reason
- Values:** Count of Eligibility_Type, Count of Exit_Reason

Red boxes and arrows in the image highlight the 'Exit_Reason' field being added to the Rows and Values areas, and the 'IFSP_Date' filter being set to 'Missing' and 'Blank'.

The pivot table will now display the *exit reasons for referrals who had a 45-day timeline ending within the reporting period, were determined eligible, but did not go on to have an IFSP completed.*

APPENDIX C: DETERMINING NUMBER OF INITIAL, PERIODIC, AND ANNUAL IFSPs COMPLETED DURING PERIOD

Step 1: Go to EIDS, “Reports”, and select “EI Services Report”

The screenshot shows the EIDS web application interface. At the top, there is a navigation bar with 'Home', 'Reports', 'Administration', 'ET Info', and 'System Admin'. Below this, a status message reads 'Report data last refreshed on 8/2/2023 8:37 AM.' The main content area is titled 'Report List' and contains two sections: 'Central Coordination Reports' and 'Early Intervention Reports'. The 'EI Services' link under the 'Early Intervention Reports' section is highlighted with a red box. The left sidebar contains links for 'County Reports', 'DSR Reports', and 'Ad-Hoc Report', along with a small image of a child.

Step 2: Select your county from dropdown, enter beginning and ending dates for reporting period, click “Get Report”

The screenshot shows the 'EI Services Report' form in the EIDS application. The navigation bar is the same as in the previous screenshot. The status message now reads 'Report data last refreshed on 8/2/2023 8:39 AM.' The form contains the following fields: '*County:' with a dropdown menu set to 'All'; '*IFSP Date From:' with a date picker set to '07 / 01 / 2023'; '*IFSP Date To:' with a date picker set to '12 / 31 / 2023'; and '*Report Format:' with a dropdown menu set to 'EXCEL'. A 'Get Report' button is located to the right of the form. A red asterisk indicates that the fields with an asterisk are required. The left sidebar is also visible, showing the same navigation options and child image.

Step 3: When report has downloaded, open and save as “Excel Workbook” (see Step 5 from Appendix A for detailed instructions)

Step 4: Once worksheet is opened, go to cell A2, go to “Data” tab, and click “Remove Duplicates”

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Data Tools' group in the ribbon has the 'Remove Duplicates' button highlighted with a red box. The spreadsheet data is as follows:

MR County	ETID	Last Name	First Name	DOB	Due Date	Sex	MR Service Coordinator	MR Service Coordinator Agency	Referral Date	E&A C
Coshocton						Male		County Board of Developmental Disabilities	6/17/2022	
Coshocton						Female		County Board of Developmental Disabilities	2/10/2022	
Coshocton						Female		County Board of Developmental Disabilities	7/14/2022	
Coshocton						Male		County Board of Developmental Disabilities	8/26/2021	
Coshocton						Female		County Board of Developmental Disabilities	9/6/2022	
Coshocton						Male		County Board of Developmental Disabilities	8/4/2020	
Coshocton						Female		County Board of Developmental Disabilities	7/6/2022	
Coshocton						Female		County Board of Developmental Disabilities	8/31/2022	
Coshocton						Female		County Board of Developmental Disabilities	7/29/2021	
Coshocton						Female		County Board of Developmental Disabilities	7/29/2021	
Coshocton						Female		County Board of Developmental Disabilities	11/15/2022	
Coshocton						Male		County Board of Developmental Disabilities	6/1/2022	
Coshocton					10/14/2021	Male		County Board of Developmental Disabilities	3/24/2022	
Coshocton					3/11/2022	Female		County Board of Developmental Disabilities	3/23/2022	
Coshocton						Female		County Board of Developmental Disabilities	1/20/2022	
Coshocton						Female		County Board of Developmental Disabilities	6/8/2022	
Coshocton						Male		County Board of Developmental Disabilities	10/11/2022	
Coshocton						Male		County Board of Developmental Disabilities	8/3/2022	
Coshocton						Male		County Board of Developmental Disabilities	8/3/2022	
Coshocton						Male		County Board of Developmental Disabilities	6/10/2022	
Coshocton						Male		County Board of Developmental Disabilities	6/10/2022	
Coshocton						Male		County Board of Developmental Disabilities	4/13/2021	

Step 5: When the “Remove Duplicates” box pops up, click “Unselect All” and then manually select the “ETID” and “IFSP Type” columns, click “OK”

The screenshot shows the Microsoft Excel interface with the 'Remove Duplicates' dialog box open. The dialog box contains the following elements:

- Buttons: Select All, Unselect All (highlighted with a red box), My data has headers (checked).
- Columns list:
 - MR County
 - ETID
 - Last Name
 - First Name
 - DOB
- Buttons: OK, Cancel.

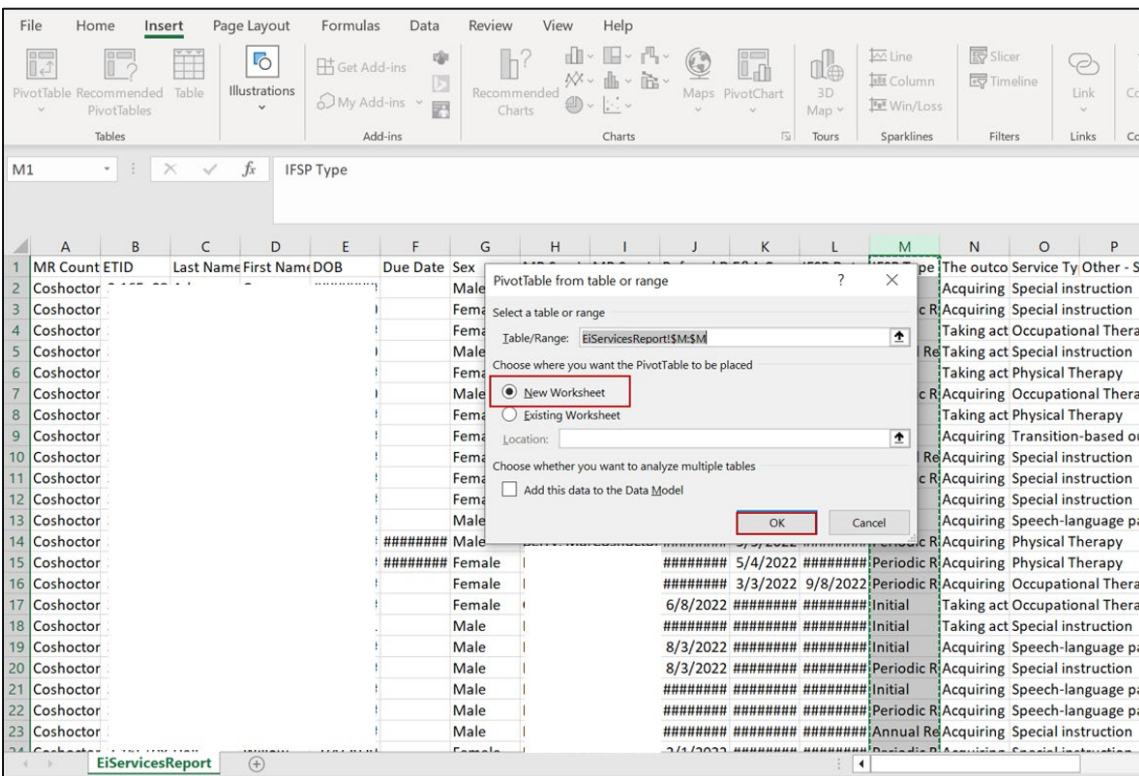
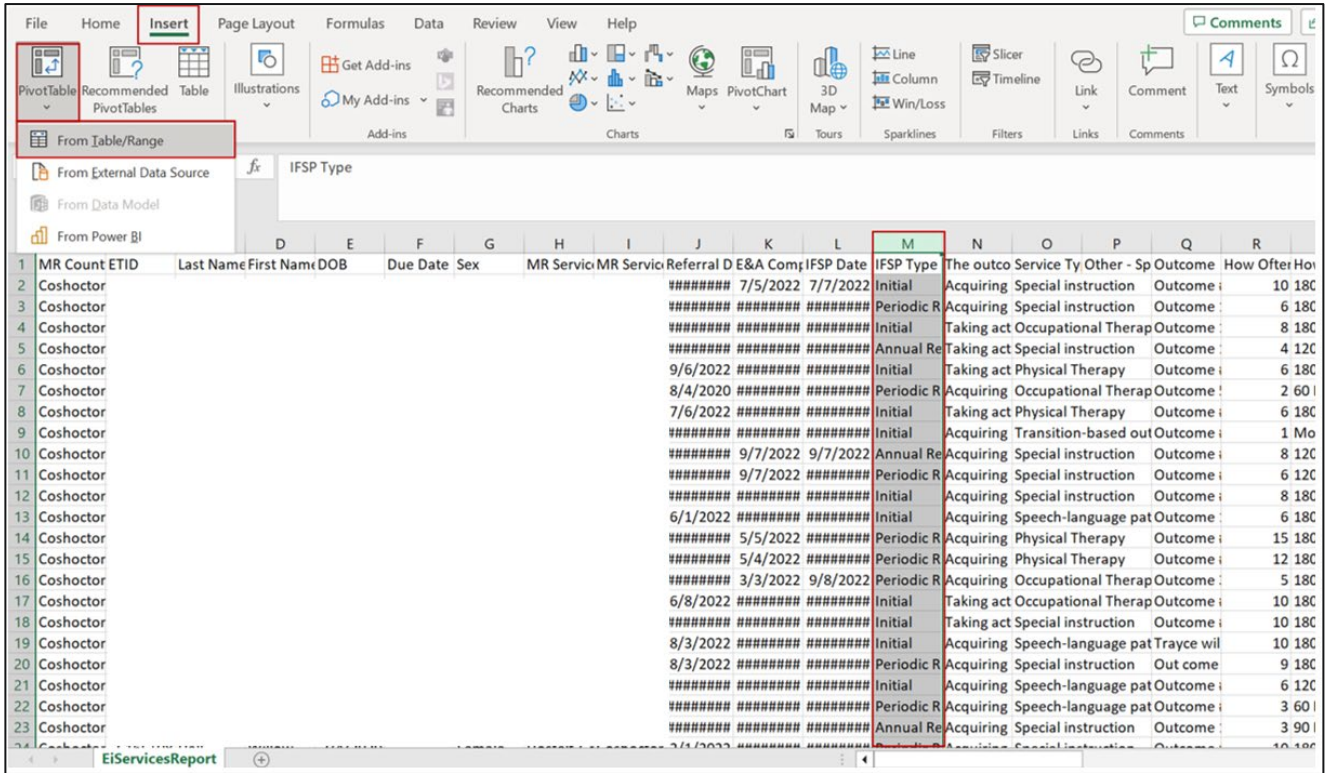
The background spreadsheet shows a table with columns: MR County, ETID, Last Name, First Name, DOB, Due Date. The data includes multiple rows with 'Coshocton' in the MR County column.

The screenshot shows the Microsoft Excel interface with the 'Remove Duplicates' dialog box open. The dialog box contains the following elements:

- Buttons: Select All, Unselect All, My data has headers (checked).
- Columns list:
 - MR County
 - ETID
 - Last Name
 - First Name
 - DOB
 - Due Date
 - IFSP Type (highlighted with a red box)
 - The outcome(s) below address(es)
- Buttons: OK (highlighted with a red box), Cancel.

The background spreadsheet shows a table with columns: MR County, ETID, Last Name, First Name, DOB, Due Date. The data includes multiple rows with 'Coshocton' in the MR County column.

Step 6: After removing duplicates, highlight column containing “IFSP Type,” go to “Insert” tab, and insert pivot table from “Table/Range”



Step 7: Open worksheet containing pivot table and drag “IFSP Type” to “Rows” and “Values”

The screenshot shows the Microsoft Excel interface with the PivotTable Analyze ribbon selected. The PivotTable is located in the worksheet, and the PivotTable Fields task pane is open on the right. The task pane shows the field 'IFSP Type' selected and dragged to the 'Rows' and 'Values' areas. The PivotTable displays the following data:

Row Labels	Count of IFSP Type
Annual Review	10
Initial	25
Periodic Review	34
(blank)	
Grand Total	69

The pivot table now displays the total number of IFSPs completed during the reporting period, including initial, periodic, and annual

APPENDIX D: IDENTIFYING NCR ASSOCIATED WITH MISSED TIMELINES

Step 1: Go to EIDS, “Reports”, and select “45-Day Compliance Monitoring” report

51	Parent/Child Reason
52	Couldn't locate/reach family
53	Emergency related closure
54	HMG staff error
55	HMG system reason
56	System reason – COVID-19

Step 2: Select your county from dropdown, enter beginning and ending dates for reporting period, click “Get Report”

Home Reports Administration ET Info System Admin

Report data last refreshed on 7/24/2023 11:48 AM.

45-Day Compliance Monitoring Report

County: ALL

Contract:

Agency:

Worker:

*Date Option: 45-Day Timeline Ends
 45-Day Referral Date

*Report Start Date: 07/01/2023

*Report End Date: 12/31/2023

*Report Type: Data Extract
 Data Summary

*Report Format: EXCEL

* Indicates required field.

Get Report

Environment Version 4.0.30319.42000 Build Number: # 0.0.0.0 Site Last updated at :Friday, June 9, 2023 10:33 AM

Ohio | Department of Developmental Disabilities

Step 3: When report has downloaded, open and save as “Excel Workbook” (see Step 5 from Appendix A for detailed instructions)

Step 4: Highlight column O "IFSP_NCR", go to "insert" tab, and insert pivot table from "Table/Range". Next, click "OK" to insert pivot table to a new worksheet

The screenshot shows the Microsoft Excel interface with the 'Insert' tab selected. The 'PivotTable' button is highlighted, and the 'From Table/Range' dropdown menu is open. Below the ribbon, the spreadsheet data is visible, with column O ('IFSP_NCR') highlighted in grey. The data includes columns for assessment dates, NCR values, family assessment dates, family assessment NCR values, IFSP dates, IFSP NCR values, exit dates, and exit reasons.

	K	L	M	N	O	P	Q	
1	NCR_Child_Assessment_Date	Child_Assessment_NCR	Family_Assessment_Date	Family_Assessment_NCR	IFSP_Date	IFSP_NCR	Exit_Date	Exit_Reason
2	51	7/20/2022	51	8/11/2022	51	9/29/2022	56	1/25/2023 Reached Age 3, Part B Eligible
3		11/16/2022		11/23/2022		12/6/2022		
4		11/16/2022		11/23/2022		12/6/2022		
5		11/16/2022		11/23/2022		12/6/2022		
6		10/20/2022		10/26/2022		11/2/2022		7/10/2023 Loss of contact with family
7	51	9/30/2021		9/7/2021		6/29/2022		9/27/2022 Reached Age 3, Part B Eligible
8		7/7/2022		7/14/2022		8/10/2022	51	10/29/2022 Reached Age 3, Part B Eligible
9		7/6/2022		7/20/2022		7/21/2022		
10		7/18/2022		8/2/2022		8/11/2022		
11		9/1/2022	56	9/1/2022	56	9/7/2022	56	8/29/2022 Family no longer interested
12		8/4/2022		8/18/2022		9/22/2022		
13		9/2/2022		9/1/2022		9/12/2022		1/17/2023 Loss of contact with family
14		8/26/2022		9/7/2022		9/23/2022	51	6/21/2023 Reached Age 3, Part B Eligible
15		9/1/2022		9/16/2022		9/23/2022		
16		8/31/2022		9/15/2022		9/21/2022		
17		9/8/2022		9/15/2022		9/19/2022		
18		9/16/2022		9/30/2022		10/7/2022		3/6/2023 Reached Age 3, Part B Eligible
19		9/22/2022		10/7/2022		10/21/2022		3/10/2023 Reached Age 3, Part B Eligible
20		11/9/2022		11/30/2022		12/7/2022	51	3/20/2023 Family no longer interested
21		10/5/2022		10/18/2022		10/25/2022		1/9/2023 Family no longer interested
22		10/14/2022		10/21/2022		11/4/2022		
23		10/20/2022		10/28/2022		11/3/2022		7/18/2023 Reached Age 3, Part B eligibility not determined

The screenshot shows the 'PivotTable from table or range' dialog box in Microsoft Excel. The 'Table/Range' field is set to 'rpt45DayComplianceMonitorReport!\$O:\$O'. The 'New Worksheet' radio button is selected, and the 'OK' button is highlighted. The background spreadsheet shows the same data as the previous screenshot, with column O ('IFSP_NCR') highlighted.

	K	L	M	N	O	P	Q	
1	Assessment_Date	Child_Assessment_NCR	Family_Assessment_Date	Family_Assessment_NCR	IFSP_Date	IFSP_NCR	Exit_Date	Exit_Reason
2	7/20/2022	51	8/11/2022	51	9/29/2022	56	1/25/2023	Reached Age 3, Part B Eligible
3	11/16/2022		11/23/2022		12/6/2022			contact with family
4	11/16/2022		11/23/2022		12/6/2022			d Age 3, Part B Eligible
5	11/16/2022		11/23/2022		12/6/2022			d Age 3, Part B Eligible
6	10/20/2022		10/26/2022		11/2/2022			
7	9/30/2021		9/7/2021		6/29/2022			
8	7/7/2022		7/14/2022		8/10/2022	51		
9	7/6/2022		7/20/2022		7/21/2022			
10	7/18/2022		8/2/2022		8/11/2022			
11	9/1/2022	56	9/1/2022	56	9/7/2022	56		no longer interested
12	8/4/2022		8/18/2022		9/22/2022			
13	9/2/2022		9/1/2022		9/12/2022			1/17/2023 Loss of contact with family
14	8/26/2022		9/7/2022		9/23/2022	51		6/21/2023 Reached Age 3, Part B Eligible
15	9/1/2022		9/16/2022		9/23/2022			
16	8/31/2022		9/15/2022		9/21/2022			
17	9/8/2022		9/15/2022		9/19/2022			
18	9/16/2022		9/30/2022		10/7/2022			3/6/2023 Reached Age 3, Part B Eligible
19	9/22/2022		10/7/2022		10/21/2022			3/10/2023 Reached Age 3, Part B Eligible
20	11/9/2022		11/30/2022		12/7/2022	51		3/20/2023 Family no longer interested
21	10/5/2022		10/18/2022		10/25/2022			1/9/2023 Family no longer interested
22	10/14/2022		10/21/2022		11/4/2022			
23	10/20/2022		10/28/2022		11/3/2022			7/18/2023 Reached Age 3, Part B eligibility not determined

Step 5: Open the worksheet containing the pivot table; Drag “IFSP_NCR” to the “Rows” and “Values” boxes

The screenshot displays the Microsoft Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is located in the worksheet and shows the following data:

Row Labels	Sum of IFSP_NCR
51	204
52	52
56	112
(blank)	
Grand Total	368

The PivotTable Fields task pane on the right shows the following configuration:

- Choose fields to add to report:** IFSP_NCR (checked)
- Drag fields between areas below:**
- Rows:** IFSP_NCR
- Values:** Sum of IFSP_NCR

Red arrows in the task pane indicate the drag action from the field list to the Rows and Values areas.

Step 6: Double click on “Sum of IFSP_NCR” (either in the values field or pivot table column heading); When the Value Field Settings box pops up, select “count” and click ok. This will provide the count of each NCR

The screenshot shows the Microsoft Excel interface with a PivotTable and the Value Field Settings dialog box open. The PivotTable is located in the range B3:B8, with 'Row Labels' in column A and 'Sum of IFSP_NCR' in column B. The data in the PivotTable is as follows:

Row Labels	Sum of IFSP_NCR
51	204
52	52
56	112
(blank)	
Grand Total	368

The Value Field Settings dialog box is open, showing the following details:

- Source Name: IFSP_NCR
- Custom Name: Count of IFSP_NCR
- Summarize Values By: Show Values As
- Summarize value field by: Choose the type of calculation that you want to use to summarize data from the selected field. The list includes Sum, Count, Average, Max, Min, and Product. 'Count' is selected.
- Buttons: Number Format, OK, Cancel

The PivotTable Fields task pane on the right shows the following configuration:

- Choose fields to add to report: IFSP_NCR
- Drag fields between areas below:
 - Filters: (empty)
 - Columns: (empty)
 - Rows: IFSP_NCR
 - Σ Values: Sum of IFSP_NCR
- Defer Layout Update: (unchecked)
- Update: (button)

Depending on how many NCRs you had during the reporting period, you may want to filter the row field to only include relevant NCR codes 52-56. To do this, click on the arrow beside “Row Labels” (field has been renamed to “NCR Code” in screenshot below), select only NCR codes 52-56, and click ok.

The screenshot displays the Microsoft Excel interface with a PivotTable. The PivotTable is titled "Count of IFSP_NCR" and is located in the range A3:M8. The PivotTable fields are: Row Labels: NCR Code, and Values: Count of IFSP_NCR. A filter menu is open for the "NCR Code" field, showing options to sort (A to Z, Z to A), clear filters, and filter by labels or values. The "Value Filters" section is expanded, showing a search box and a list of items: (Select All), 51, 52, 56, and (blank). The "52" and "56" items are checked. The "OK" button at the bottom of the filter menu is highlighted with a red box. The PivotTable Fields task pane on the right shows the "IFSP_NCR" table selected and the "NCR Code" field in the Rows area and "Count of IFSP_NCR" in the Values area.

NCR Code	Count of IFSP_NCR
51	
52	
56	
(blank)	
Grand Total	

APPENDIX E: LOCATING COUNTY DETERMINATIONS ON OHIO EI WEBSITE

Step 1: Go to the Ohio Early Intervention website at <http://www.ohioearlyintervention.org>

Step 2: Click on “Data and Monitoring” Tab

HIO Early Intervention *Helping children and families wherever they choose to live, play, and spend their day.*

Login | Create an Account
Search

Home About Families Providers **Data and Monitoring** Advisory Council

What is Ohio Early Intervention?
A statewide system that provides coordinated services to parents of infants and toddlers with disabilities or developmental delays in Ohio.

[Learn More](#)


Step 3: Select “County Data”

Data and monitoring are key components of any state's Early Intervention program. On these pages, you can learn more about the reports Ohio has submitted to the Office of Special Education Programs (OSEP), local county EI program data, state and federal compliance standards, and how to access the EI data system.

<p>Federal Reporting and Postings</p> <p>Explore documents submitted as part of federally required reporting</p>	<p>County Data</p> <p>View data and reports specific to your county</p>	<p>Monitoring</p> <p>Learn about Ohio's EI monitoring processes and protocols</p>	<p>Data System</p> <p>Access the Early Intervention Data System and related information</p>
<p>Data and Monitoring Resources</p> <p>Discover resources to guide you through data and monitoring</p>			

Step 4: Click on your county within the map or use the “View County List” and select your county from the list

Step 5: Once you have selected your County, data specific to your county will be displayed on the right. Simply click the APR & Determination you want to view



Helping children and families wherever they
choose to live, play, and spend their day.

[Login](#) | [Create an Account](#)

[Search](#)

Home

About


Families

Providers

Data and Monitoring

Advisory Council

County Data



Mahoning County

Annual Report and Determination

This section contains compliance and performance data for the county's Early Intervention Program. Select the link below to view PDF versions of the county-level APR and Determinations Reports.

[Mahoning County SFY22 APR & Determination Report](#)

[Mahoning County SFY21 APR & Determination Report](#)

[Mahoning County SFY20 APR & Determination Report](#)

Family Questionnaire County Data Report

This section contains the results of a survey completed by families served in Early Intervention about their experiences in the county's program. These data expand upon items required to be reported in the APR regarding family outcomes in EI. Select the links below to access these reports in a PDF format.

[Mahoning County 2022 Family Questionnaire Report](#)

[Mahoning County 2021 Family Questionnaire Report](#)

[Mahoning County 2020 Family Questionnaire Report](#)

View County List

- | Adams | Allen | Ashland | Ashtabula | Athens | Auglaize
- | Belmont | Brown | Butler | Carroll | Champaign | Clark |
- Clermont | Clinton | Columbiana | Coshocton | Crawford |
- Cuyahoga | Darke | Defiance | Delaware | Erie | Fairfield |
- Fayette | Franklin | Fulton | Gallia | Geauga | Greene |
- Guernsey | Hamilton | Hancock | Hardin | Harrison |
- Henry | Highland | Hocking | Holmes | Huron | Jackson |
- Jefferson | Knox | Lake | Lawrence | Licking | Logan |
- Lorain | Lucas | Madison | Mahoning | Marion | Medina |
- Meigs | Mercer | Miami | Monroe | Montgomery | Morgan |
- Morrow | Muskingum | Noble | Ottawa | Paulding |
- Perry | Pickaway | Pike | Portage | Preble | Putnam |
- Richland | Ross | Sandusky | Scioto | Seneca | Shelby |
- Stark | Summit | Trumbull | Tuscarawas | Union | Van
- Wert | Vinton | Warren | Washington | Wayne | Williams |
- Wood | Wyandot |

[Return to all county data](#)