SERVICE COORDINATION OVERSIGHT REPORT GUIDE



epartment of evelopmental isabilities



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SC Oversight Report

Introduction

Beginning with SFY24, Early Intervention Contract Managers will be required to complete and deliver the El 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 El program, including information pertaining to El referrals, outreach and child find, service coordination, El 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, 2023 and December 31, 2023 and must be shared with local council no later than February 29, 2024. The second report will cover activities that occurred from January 1, 2024 to June 30, 2024 and must be shared with local council no later than August 31, 2024.

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.

Report prepared for period from July 1, 2023-Dec 31, 2023 Report presented to local FCFC by Feb 29, 2024 Report prepared for period from Jan 1, 2024-June 30, 2024 Report presented to local FCFC by Aug 31, 2024

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 El 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 <i>El.* 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 El referrals. See Appendix A for step-by-step instructions for obtaining the number of El 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 <u>Ohio El website</u> and see the "<u>Referrals Extract Instructions and Tips</u>" 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.). Additionally, you will need to provide information regarding any upcoming outreach activities that are planned at the local level. Finally, you will need to 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 the eligibility section, you will need data pertaining to eligibility for the current and previous reporting periods. *As mentioned in the previous section, it is important to maintain copies of all submitted 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 the number of referrals who 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 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.

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2 3 4 5	Instructions: Identify the roles and people ass coordinators, supervisors, all evaluators and a once. Subrecipients are required to submit rev positions. Administrative Agency Name: Name of person completing Addendum B Date Addendum B completed	sociated with DODD EI grant agreement sssessors, and other personnel as neces sied contact sheets to their assigned EI	s by completing this spreadsheet. Add a sary. Please note it is possible some pe program consultant within 14 days of a	dditional lines as needed for service ople's names may appear more than ny contact changes within these			
6 7	County/Counties Served:	Name	Title/Discipline	Agency	GMS User	Admin Agent Staff, Contractor, or Other	Evaluator & Child Assessor Licensure/Certification Expir Date(s) - (If Applicable)
8	Fiscal Agent - Head of Organization/Director						
9	Fiscal Agent- Fiscal Contact						
10	GMS User						
11	FCFC Coordinator						
12	El Contract Manager						
13	El Contract Manager Stand-in						
14	EIDS System Administrator						
15	EI SC Supervisor						
16	ELSC						
17	Other SC agency personnel						
18	Evaluators & Assessors						
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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 SC 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 El 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 "El Services Report Instructions and Tips," navigate to the Ohio El 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 SC 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 El 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 identify 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 <u>Ohio EI website</u> under the "Data and Monitoring" tab.



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.

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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 a certain period and identifies which funding source is used for each service on the IFSP. This data will help to determine how many SOP submissions were made during the reporting period and specify 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 outlined in your SC grant Program Narrative will provide detailed information pertaining to oversight and supervision of service coordination. Furthermore, 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 <u>Baseline Calendar</u> can be found on the <u>Ohio El website</u>.

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 <u>OCALI's</u> <u>"C to B Transition" training</u>. 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 El 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 <u>Ohio EI website</u> at <u>www.ohioearlyintervention.org/county-data</u>. 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 <u>Erin.Hale@dodd.ohio.gov</u>. 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 <u>https://ohioearlyintervention.org/technical-assistance-team</u>

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"

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



Step 4: When the report has downloaded, click "Open"

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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"

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

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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

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16				Male	White		Non-Hispanic	10/20/2022	Physician	Fam
17				Male	White		Non-Hispanic	10/26/2022	Physician	Fam
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Step 8: Open new worksheet, go to cell A1, click Ctrl+V to paste copied columns

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Step 9: With your cursor in cell A2, 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 duplicates, if any, were removed)

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

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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)

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<u>N</u> ew Work <u>Existing W</u>	ksheet /orksheet		
New Work Existing W Location: D1	ksheet /orksheet		

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

File	Home	e Insert Page Layout F	ormulas	Data Review View H	Help PivotTable Ar	alyze Design		Com	ments 🖻 Share 👻
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11	1	WIC		PCSA Form (HEA 8021)	16	referra	source		
12	1	Parent		Physician	18		-		
13	i.	Hospital Child Find Specialist		State Health Department	3				
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23	11	Parent							
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26,6262	H	lancock rptGetCentralIntakeRefe	Sheet1	\oplus	: [4]			Defer Layout Update	Update

*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".

Home	≣Reports	Administration	ET Info	 System Admin	
	Report data last r	efreshed on 6/2/2023 10):57 AM.		
County Reports					
DSR Reports	Report List				
Ad-Hoc Report					
10. A. C. C. MARCO	Central Coordina	ation Reports			
	Central Coordinati	on Contacts			
	Central Coordinati	on Monitoring			
	Central Intake Cor	ntacts			
	Child Transfer Cou	inty Contact List			
	Referrals Extract				
	Waitlisting				
	Early Interventi	on Ponorte			
	45-Day CAP Los	on Reports			
	45-Day CAP Log	Manitaring Depart			
	45-Day Compliand	te Monitoring Report			
	45-Day Into For A	II Referrals			
	Active Service Coo	ordinator			
	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."

Home	#Reports	Administration	ET Info	System Admin	
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		Cour Contra Agen Work	ty: Marion act: Early Interven cy: ALL	ation (Marion County Early Intr	Get Report
	* Indicates requir	*Date Opti *Report Start Da *Report End Da *ReportTy *Report Form ed field.		neline Ends ferral Date	
	Environment Version 4.0.3	0319.42000 Build Number:# 0.0.0.0 Site Last u	pdated at :Friday, June 9,	2023 10:33 AM	
		O		partment of velopmental Disabilities	

*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..."

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4		Missing		7/21/2022	Child/Family not eligible			No Destination Identified		Conditional Ecomottina
5		7/6/2022		11/14/2022	Reached Age 3, Part B Eligible			Public Preschool		Conditional Formatting
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11		Missing		10/22/2022	Unable to contact family			No Destination Identified		CM Persection Faust
12		9/21/2022	1	11/19/2022	Reached Age 3, Part B Eligible			Public Preschool		
13		Missing		1/4/2023	Family no longer interested			Public Preschool		
14		Missing		10/30/2022	Child/Family not eligible			No Destination Identified		
15	51	9/19/2022	51	11/5/2022	Family no longer interested			Home		
16		Missing		8/22/2022	Unable to contact family			No Destination Identified		
17		9/7/2022	51	2/19/2023	Reached Age 3, Part B Eligible	8		No Destination Identified		
18		9/15/2022	51	3/30/2023	Reached Age 3, Part B Eligible	0		Public Preschool		
19		8/24/2022		4/20/2023	Reached Age 3, Part B Eligible	8		Public Preschool		
20		8/23/2022		4/14/2023	Reached Age 3, Part B Eligible	•		Public Preschool		
21		Missing		10/11/2022	Family no longer interested			Home		
22		7/20/2022		10/26/2022	Reached Age 3, Not Eligible for	or Part B, exit to other pro	ogram	Child Care Center		
23		7/25/2022	51	11/3/2022	Loss of contact with family			No Destination Identified		
24	Sheet1 Sheet	2 rpt45Da	Complianc	eMonitorRe	eport (+)		1	Dublis Percebaal		•

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)

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19		8/24/2022		4/20/2023	Reached Age 3, Part B Eligible Public Preschool				
20		8/23/2022		4/14/2023	Reached Age 3, Part B Eligible Public Preschool				
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23		7/25/2022	51	11/3/2022	2022 Loss of contact with family No Destination Identi				
- 14	Sheet1 Sheet2	rpt45Day	Complian	ceMonitorR	eport (+) : (

Step 5: With your cursor in cell A2, go to "Insert" tab and insert pivot table "From Table/Range" (*Make sure entire worksheet is highlighted/selected); Click "OK" to insert pivot tab to new worksheet

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11		1	10/3/2022		Missing	Mir
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13		1	11/7/2022		Missing	Mir
14		5	9/16/2022		Missing	Mit
15		1	8/29/2022	2.0+ Standard Deviation Delay	9/8/2022	51
16		1	8/8/2022		Missing	Mi
17		1	8/29/2022	ICO	8/24/2022	
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19		1	8/29/2022	2.0+ Standard Deviation Delay	8/11/2022	
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21		1	7/18/2022		Missing	Mit
22		5	7/24/2022	2.0+ Standard Deviation Delay	7/1/2022	
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Sheet1 Sheet2 rpt45DayCompliar	nceMonitorReport (+)	-	0/12/2022	3.0. Clandard Deviation Dalass	0/33/2033	P.4.

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

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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

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22	Sheet1 Sheet	t2 Sheet3 r	rpt45DayCompli	anceMonitorRepo	ort ⊕ : [•			Defer Layout Update	Update

Step 8: Next, drag "Eligibility_Type" to Rows and Values

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Step 9: Click on filter beside "Row Labels", deselect "Not Eligible" and "(blank)", click "OK".



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 table using CTRL+C and paste in cell below using CTRL+V (*leave 2-3 empty rows in between copy/pasted tables)

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$\begin{array}{c c} & & \\ \hline \\ Paste \\ \hline \\ Clipboard \\ \hline \\ \hline \\ \\ \\ \hline \\ \\ \\ \hline \\ \\ \hline \\ \\ \\ \\ \hline \\ \\ \\ \hline \\ \\ \hline \\ \\ \\ \hline \\ \\ \\ \hline \\ \\ \\ \hline \\ \\ \hline \\ \\ \\ \hline \\ \\ \\ \\ \hline \\ \\ \\ \hline \\ \\ \\ \hline \\ \\ \\ \\ \hline \\ \\ \\ \\ \\ \hline \\ \\ \\ \\ \hline \\ \\ \\ \\ \\ \hline \\$	B Wrap Text General General	Insert ~ ∑ ∠ Delete ~ ∴ Sort & Find & Select ~ Format ~ Cells Editing
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13 ICO 308		
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Step 11: In the pasted pivot table, click on the filter beside "Row Labels", deselect "Dx on List" and "Dx on Form", click "OK"



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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 referrals were eligible and had an IFSP completed, copy pivot table using CTRL+C and paste to new cell using CTRL+V (Leave 2-3 empty rows between copy/pasted pivot tables)

Step 13: Drag "Eligibility_Type" back to fields and drag "IFSP_Date" to Filters and Values



Step 14: Click on filter beside "(Multiple Items)" and deselect "missing" and "blank" (you may have to scroll to the end to deselect blank)



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

Step 15: To determine the number of referrals who were eligible, but did *not* have a completed IFSP, go back to the filter select <u>only</u> "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 <u>not</u> have an IFSP completed

Step 16: To look at the exit reasons for referrals who had 45-day timelines ending during the reporting period, click filter beside "(Multiple Items)" in "Count of IFSP_Date" pivot table and ensure only "missing" and "blank" are selected

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Step 17: Drag "IFSP_Date" from "Values" back up to fields list (leave "IFSP_Date" in "Filters" field)

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Step 18: Drag "Exit_Reason" to "Rows" and "Values" fields

The pivot table will now display exit reasons for referrals who had a 45-day timeline ending within the reporting period

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

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

Home	 Reports	Administration	ET Info	System Admin	
	Report data last i	refreshed on 8/2/2023 8	:37 AM.		
County Reports					
DSR Reports	Report List				
Ad-Hoc Report					
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	Central Coordinat	ion Contacts			
AND ALL	Central Coordinat	ion Monitoring			
	Central Intake Co	ntacts			
Section 1	Child Transfer Co	inty Contact List			
	Referrals Extract				
	Waitlisting				
	Early Interventi	on Reports			
	45-Day CAP Log				
	45-Day Compliant	ce Monitoring Report			
	45-Day Info For A	All Referrals			
	Active Service Co	ordinator			
	CAPTA Report				
	Child Outcome Ex	tract			
	Child Outcome Mo	onitoring			
	COSF - Child List	Report			
	Diagnosed Medica	al Conditions List			
	EI Redeterminatio	n			
	EI Services				
	Evaluation Report				
	Exit Extract				
	Feb 1st LEA School	ol Report			
	HV Referrals				

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	
County Reports DSR Reports Ad-Hoc Report	Report data last re EI Services Re * Indicates required	efreshed on 8/2/2023 8: eport	*County: A *IFSP Date From 7 *IFSP Date To 12 *Report Format: E	I V 7 / 01 / 2023 II 2 / 31 / 2023 II XCEL	Get Report

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"

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5 Coshocton				Male				8/26/2021
6 Coshocton				Female				9/6/2022
7 Coshocton				Male				8/4/2020
8 Coshocton				Female				7/6/2022
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15 Coshocton			3/11/2022	Female				3/23/2022
16 Coshocton				Female				1/20/2022
17 Coshocton				Female				6/8/2022
18 Coshocton				Male				10/11/2022
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Step 5: When the "Remove Duplicates" box pops up, click "Unselect All" and then manually select the "ETID" and "IFSP Type" columns, click "OK"



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

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5	Coshoctor			1	Male		#		******	*****	Annual Re	Taking act	Special	instruction	Outcome	4 120
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14	Coshoctor			*******	Male		*		5/5/2022	*****	Periodic R	Acquiring	Physica	Therapy	Outcome	15 180
15	Coshoctor			*****	Female		#		5/4/2022	*****	Periodic R	Acquiring	Physica	I Therapy	Outcome	12 180
16	Coshoctor				Female		#		3/3/2022	9/8/2022	Periodic R	Acquiring	Occupa	tional Thera	pOutcome	5 180
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Step 7: Open worksheet containing pivot table and drag "IFSP Type" to "Rows" and "Values"

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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

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 1: Go to EIDS, "Reports", and select "45-Day Compliance Monitoring" report

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

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		Oł	Depart Develo	tment of opmental 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

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7	5	9/30/2021		9/7/2021		6/29/2022	1	9/27/2022 F	Reached Age	3, Part B Eligible	
8		7/7/2022		7/14/2022		8/10/2022	51 1	D/29/2022 F	Reached Age	3, Part B Eligible	
9		7/6/2022		7/20/2022		7/21/2022					
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11	1	9/1/2022	56	9/1/2022	56	9/7/2022	56				
12	2	8/4/2022		8/18/2022				B/29/2022 F	amily no lon	nger interested	
13	3	9/2/2022		9/1/2022		9/22/2022					
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16	5	8/31/2022		9/15/2022		9/21/2022	_				
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18	3	9/16/2022		9/30/2022		10/7/2022	_	3/6/2023 F	Reached Age	3, Part B Eligible	
19)	9/22/2022		10/7/2022		10/21/2022	1	3/10/2023 F	Reached Age	3, Part B Eligible	
20		11/9/2022		11/30/2022		12/7/2022	51	3/20/2023 F	amily no lon	nger interested	
21		10/5/2022		10/18/2022		10/25/2022		1/9/2023 F	amily no lon	nger interested	
22	2	10/14/2022		10/21/2022		11/4/2022					
23	3	10/20/2022		10/28/2022		11/3/2022		7/18/2023 F	Reached Age	3, Part B eligibility	not determined
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5	11/16/2022		11/23/2022	Table/Range:	pt45DayComplia	nceMonit	torReport!\$O:	50	1			
6	10/20/2022		10/26/2022	Channel			aland			contact with family	Y	
7	9/30/2021		9/7/2021	Choose where you	want the Pivot la	ble to be	placed		6	Age 3, Part B Elig	ible	
8	7/7/2022		7/14/2022	New Worksh	neet				1	d Age 3, Part B Elig	ible	
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20	11/9/2022		11/20/2022		10/21	/2022	51	3/20/202	23 Family r	o longer intereste	d	
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Step 5: Open the worksheet containing the pivot table; Drag "IFSP_NCR" to the "Rows" and "Values" boxes



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

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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.

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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



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 El program data, state and federal compliance standards, and how to access the El data system.

Federal Reporting and Postings

Postings Explore documents submitted as part of federally required reporting

County Data View data and reports

specific to your county

Monitoring

Learn about Ohio's El monitoring processes and protocols

Data System

Access the Early Intervention Data System and related information

Data and Monitoring Resources Discover resources to guide you through data and monitoring **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

