



# SERVICE COORDINATION OVERSIGHT REPORT GUIDE



**Department of  
Developmental  
Disabilities**



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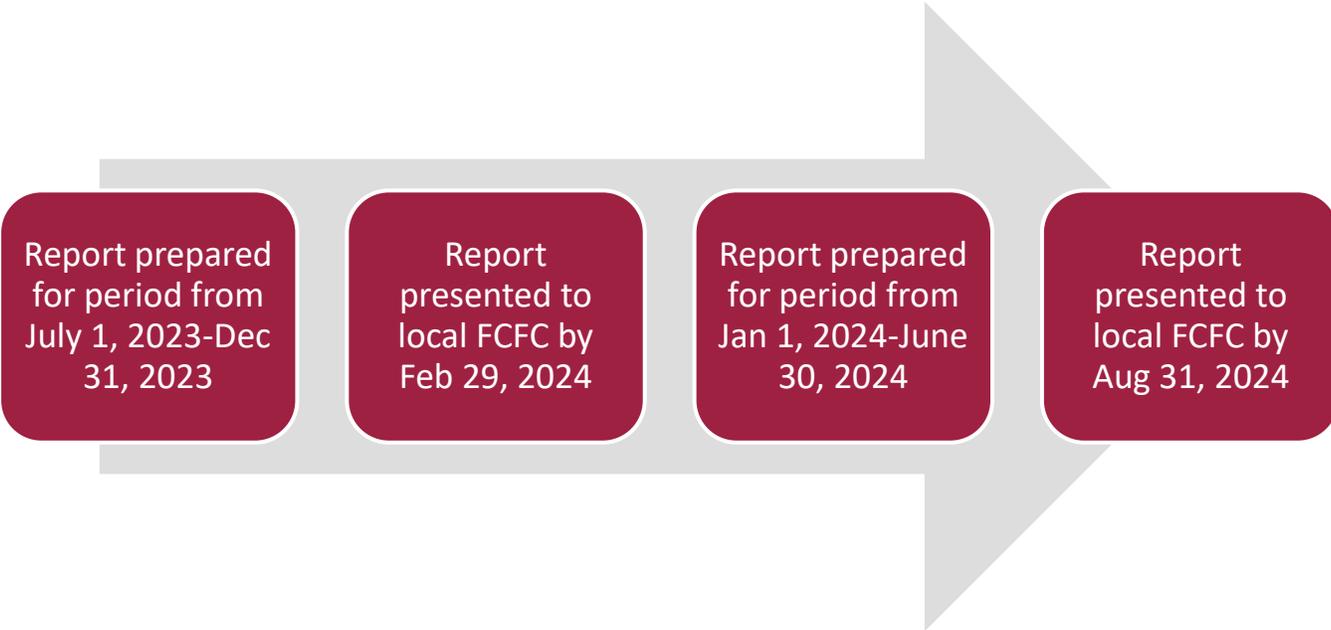
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# SC Oversight Report Guide

## Introduction

Beginning with SFY24, 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, 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 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.



## 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 displays the Microsoft Excel interface with the 'Data' tab selected. The 'Filter' button in the 'Sort & Filter' group is highlighted with a red box. The 'IFSP Added Date' column is selected, and the 'Filter' task pane is open. The task pane shows a list of months from January to December, with July through December selected. The 'OK' button at the bottom of the task pane is also highlighted with a red box. The background shows a data table with columns for Start Date, End Date, Service Deliver, Service Locatio, and Non-Compliance Reason.

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](http://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](mailto: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 top 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 contains links for County Reports, DSR Reports, and Ad-Hoc Report, along with a photo 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 top 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 contains links for County Reports, DSR Reports, and Ad-Hoc Report, along with a photo 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”

Home Reports Administration ET Info System Admin

Report data last refreshed on 7/26/2023 12:57 PM.

Referral Start Date 07/01/2023

Referral End Date 12/31/2023

County -All Counties-

Generate CSV...

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

Open when done

Always open files of this type

Pause

Show in folder

Cancel

rptGetCentralIntak...csv  
1.8/2.1 MB, 1 sec left

Show all

**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”

Documents > Bi-Weekly Updates

rptGetCentralIntakeReferrals (12)

Excel Workbook (\*.xlsx)

Save

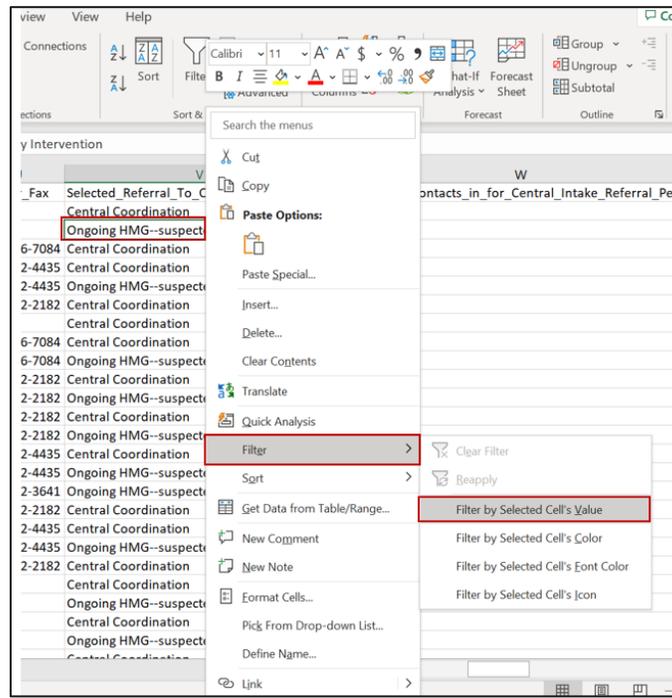
More options...

New Folder

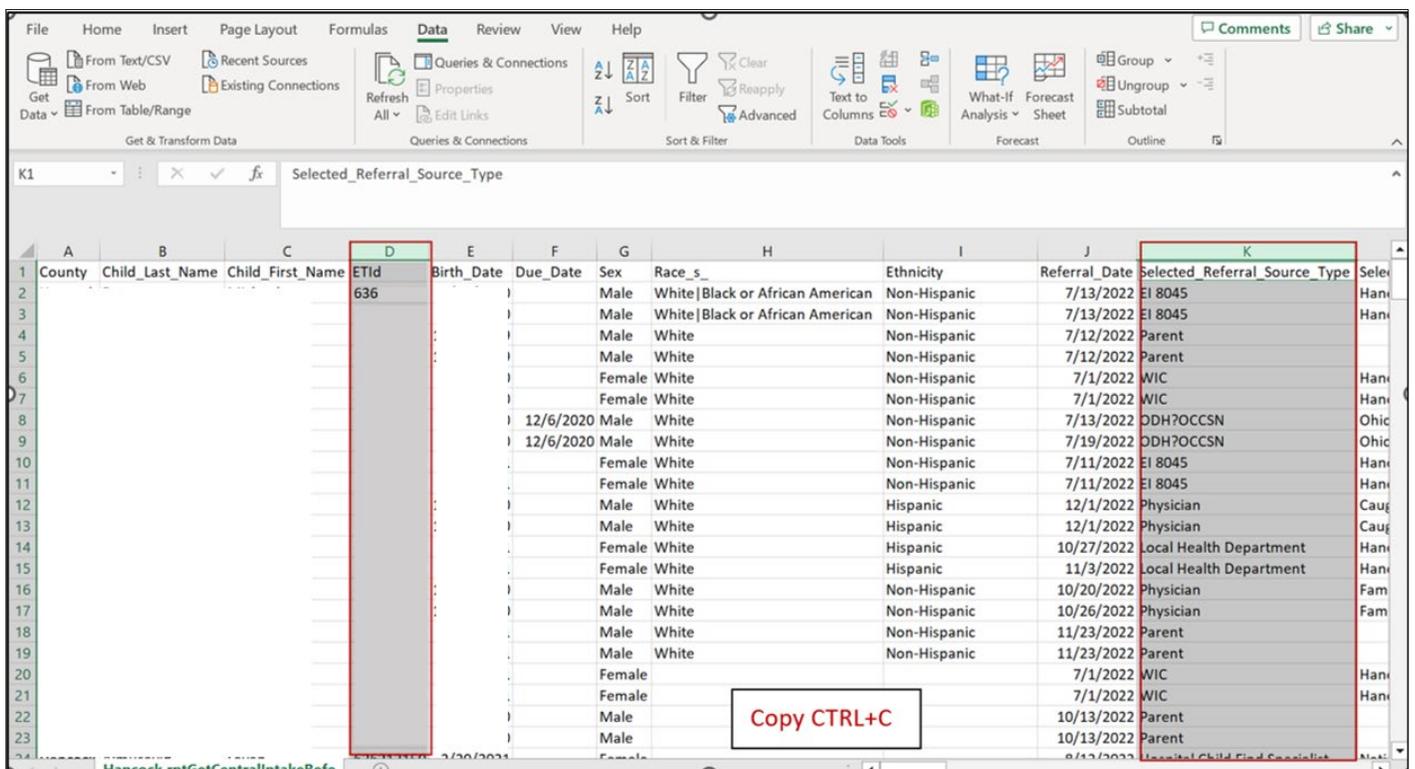
Name ↑

Date modified

**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



**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	

A red box highlights cell A1, and a callout box with the text "Paste CTRL+V" is positioned over the data.

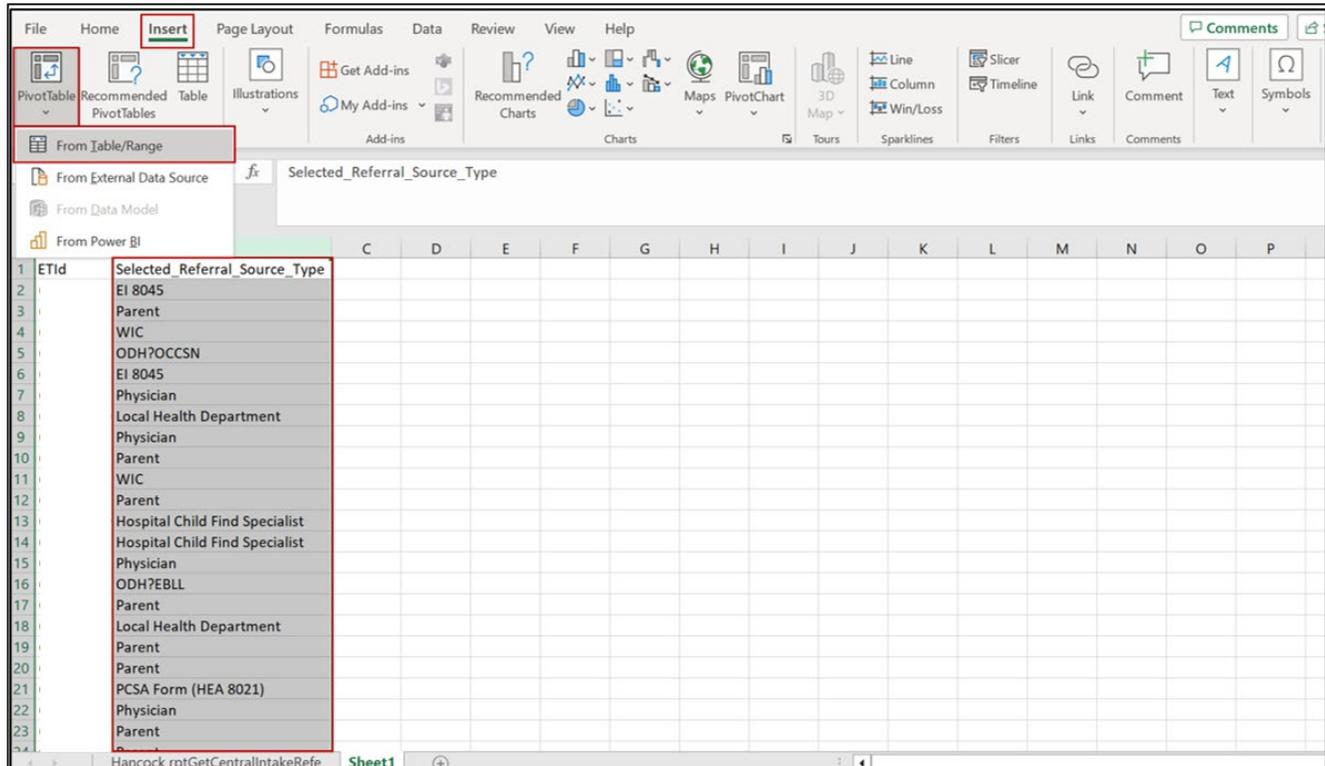
**Step 9:** Next, go to “Data” tab, and click “Remove Duplicates”; When “Remove Duplicates” box pops up, ensure that both “ETId” and “Referral Source Name” columns are selected, and click “OK”. (A pop up should tell you how many blank cells, if any, have been replaced)

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Remove Duplicates' dialog box is open, and the following columns are selected:

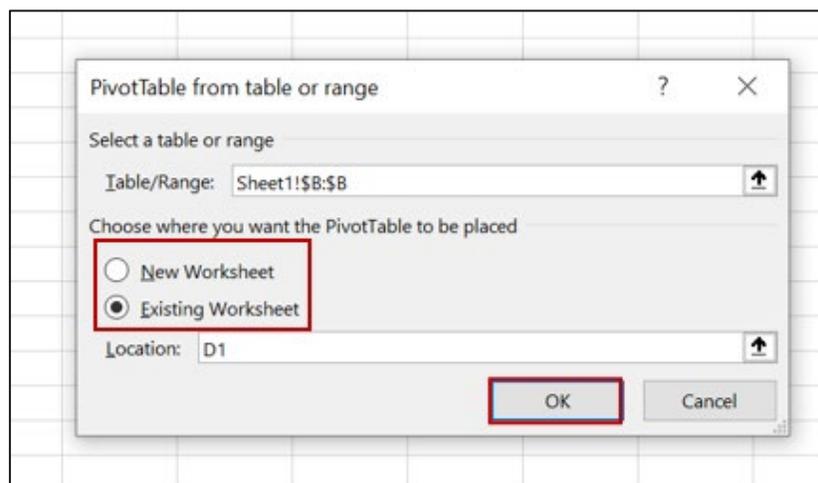
- ETId
- Selected\_Referral\_Source\_Type

The dialog box also includes options for 'Select all', 'Unselect All', and 'My data has headers'. The 'OK' button is highlighted.

**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
<b>Grand Total</b>	<b>154</b>

The PivotTable Fields task pane on the right shows:

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

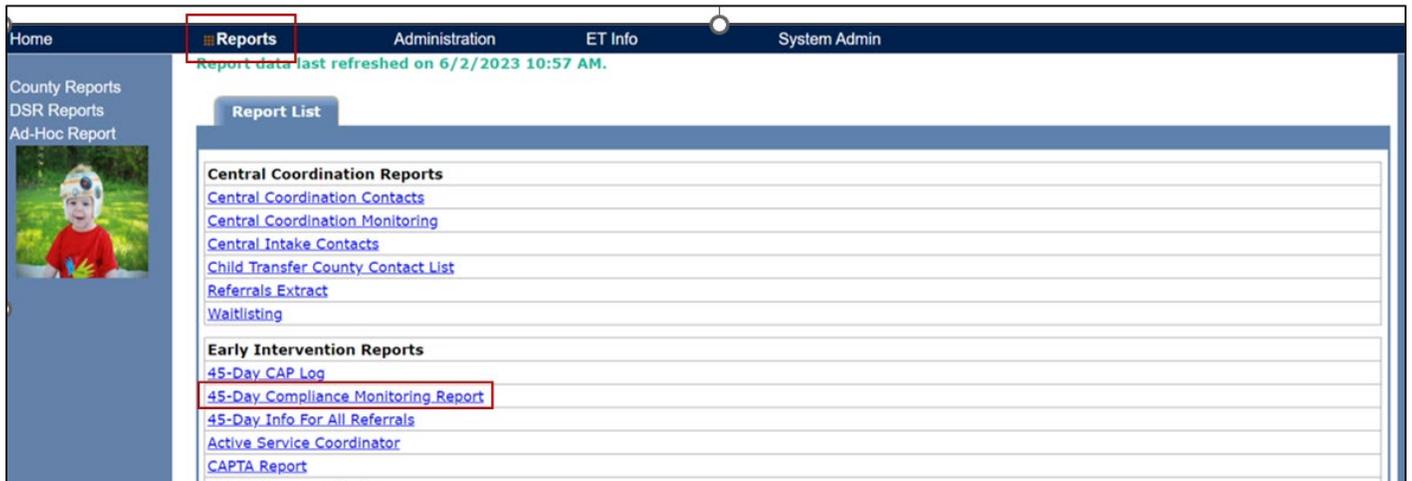
Annotations in the image include:

- A red box around the 'Grand Total' cell (154) with the text "# of referrals from each referral source".
- A red box around the 'Grand Total' cell (154) with the text "Total # of referrals".
- Red arrows pointing from the 'EI 8045' field in the Rows area to the 'Parent' and 'Physician' rows in the PivotTable.
- Red arrows pointing from the 'Count of EI 8045' field in the Values area to the 'Parent' and 'Physician' rows in the PivotTable.

\*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”.



**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 the following fields and options:

- County:** Marion
- Contract:** Early Intervention (Marion County Early Intr
- Agency:** ALL
- Worker:**
- \*Date Option:**  45-Day Timeline Ends,  45-Day Referral Date
- \*Report Start Date:** 07/01/2022
- \*Report End Date:** 12/31/2022
- \*Report Type:**  Data Extract,  Data Summary
- \*Report Format:** EXCEL

A 'Get Report...' button is highlighted in red. At the bottom of the form, there is a note: '\* Indicates required field.' The footer of the page includes the Ohio Department of Developmental Disabilities logo and version information: 'Environment Version 4.0.30319-42000 Build Number: # 0.0.0.0 Site Last updated at: Friday, June 9, 2023 10:33 AM'.

\*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 an Excel spreadsheet with the following data:

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	

The 'Find & Select' menu is open on the right side of the spreadsheet, with the 'Replace...' option highlighted. The spreadsheet is titled 'Exit\_Reason' and is located on the 'rpt45DayComplianceMonitorReport' sheet.

**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 the Microsoft Excel interface with the 'Find and Replace' dialog box open. The dialog box is positioned over a data table. The 'Find what' field is empty, and the 'Replace with' field contains the text 'Not Yet Exited'. The 'Replace All' button is highlighted with a red box. The data table has columns M through R, with 'Exit\_Reason' in column Q and 'Exit\_Destination' in column R. The 'Exit\_Reason' column contains various reasons for exit, such as 'Family refused program requirements', 'Reached Age 3, Part B eligibility not determined', and 'Reached Age 3, Part B Eligible'. The 'Exit\_Destination' column contains various destinations, such as 'Home', 'Public Preschool', and 'Child Care Center'.

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

The screenshot displays the Microsoft Excel interface. The 'Insert' tab is active, and the 'PivotTable' dropdown menu is open, with 'From Table/Range' selected. The background shows a data table with the following columns: ETID, Previous\_ETID, Child\_Name, Date\_Of\_Birth, Referral\_Date, Day45\_Timeline\_Ends, Eligibility\_Type, EligibilityCriteriaDate, Eligibility\_NCR, and Child\_As. The value '356' is entered in cell A2.

ETID	Previous_ETID	Child_Name	Date_Of_Birth	Referral_Date	Day45_Timeline_Ends	Eligibility_Type	EligibilityCriteriaDate	Eligibility_NCR	Child_As
356				9/6/2022	10/21/2022	1 1.5-1.99 Standard Deviation Delay	9/27/2022		
				5/18/2022	7/2/2022	2.0+ Standard Deviation Delay	12/10/2019		
				5/18/2022	7/2/2022		Missing		Missing
				5/26/2022	7/10/2022	1 1.5-1.99 Standard Deviation Delay	6/24/2022		
				5/26/2022	7/10/2022	1 1.5-1.99 Standard Deviation Delay	6/24/2022		
				8/3/2022	9/17/2022		Missing		Missing
				7/1/2022	8/15/2022	2.0+ Standard Deviation Delay	10/28/2021		
				9/7/2022	10/22/2022		Missing		Missing
				10/31/2022	12/15/2022	1 1.5-1.99 Standard Deviation Delay	11/14/2022		
				8/19/2022	10/3/2022		Missing		Missing
				8/12/2022	9/26/2022	2.0+ Standard Deviation Delay	9/7/2022		
				9/23/2022	11/7/2022		Missing		Missing
				8/2/2022	9/16/2022		Missing		Missing
				7/15/2022	8/29/2022	2.0+ Standard Deviation Delay	9/8/2022		51
				6/24/2022	8/8/2022		Missing		Missing
				7/15/2022	8/29/2022	ICO	8/24/2022		
				6/16/2022	7/31/2022	2.0+ Standard Deviation Delay	10/7/2021		
				7/15/2022	8/29/2022	2.0+ Standard Deviation Delay	8/11/2022		
				7/12/2022	8/26/2022	1 1.5-1.99 Standard Deviation Delay	8/16/2022		
				6/3/2022	7/18/2022		Missing		Missing
				6/9/2022	7/24/2022	2.0+ Standard Deviation Delay	7/1/2022		
				6/8/2022	7/23/2022	ICO	6/28/2022		
				7/1/2022	8/15/2022	2.0+ Standard Deviation Delay	8/22/2022		

**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:** Referral\_Date is checked and highlighted with a red box. A red arrow points from this box to the Values field in the task pane.
- Drag fields between areas below:**
  - Filters:** (Empty)
  - Columns:** (Empty)
  - Rows:** (Empty)
  - Values:** Count of Referral\_Date (highlighted with a red box)

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 open. The PivotTable is located in cells A3:A8. The PivotTable Fields task pane on the right shows the following configuration:

- Fields to add to report:** Referral\_Date (checked)
- Values:** Count of Referral\_Date

The PivotTable data is as follows:

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 open. The PivotTable is located in cells A7:A16. The PivotTable Fields task pane on the right shows the following configuration:

- Fields to add to report:** Eligibility\_Type (checked)
- Rows:** Eligibility\_Type
- Values:** Count of Eligibility\_Type

The PivotTable data is as follows:

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
<b>Grand Total</b>	<b>1054</b>

**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 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 menu for 'Row Labels' is open, showing a list of categories with checkboxes. The 'Not Eligible' and '(blank)' categories are highlighted with red boxes, 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)	
<b>Grand Total</b>	

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
<b>Grand Total</b>	<b>989</b>

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
<b>Grand Total</b>	<b>989</b>

**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 dialog box is open, showing a list of categories. The 'Dx on Form' and 'Dx on List' checkboxes are unselected, while 'ICO' is selected. The PivotTable Fields pane shows 'Eligibility\_Type' in the Rows area and 'Count of Eligibility\_Type' in the Values area. The PivotTable data is as follows:

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
<b>Grand Total</b>	<b>984</b>

The screenshot shows the Excel interface with a PivotTable. The PivotTable 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 PivotTable data is as follows:

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
<b>Grand Total</b>	<b>989</b>

The total value for the PivotTable is 785, labeled as 'Total Eligible via Evaluation'.

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 the following data:

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
<b>Grand Total</b>	<b>785</b>

The task pane, titled "PivotTable Fields", shows the following configuration:

- Filters:** Eligibility\_Type
- Rows:** (Empty)
- Columns:** (Empty)
- Values:** Count of Eligibility\_Type

An arrow in the task pane points from the "Eligibility\_Type" field in the "Rows" area to the "Filters" area, indicating the action being performed.

The screenshot displays the Microsoft Excel interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Help, PivotTable Analyze, and Design. The active worksheet is titled 'Count of Eligibility\_Type'. A PivotTable is located in the range A18:B25, with the following data:

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
<b>Grand Total</b>	<b>785</b>

A red-bordered callout box is positioned over the 'Grand Total' row, containing the text 'Total Eligible via Evaluation'. The PivotTable Fields task pane on the right side of the screen shows the following configuration:

- Choose fields to add to report:** IFSP\_Date (checked), Family\_Assessment\_Date, Family\_Assessment\_NCR, IFSP\_NCR, Exit\_Date, Exit\_Reason.
- Filters:** Eligibility\_Type, IFSP\_Date.
- Columns:** (Empty)
- Rows:** (Empty)
- Values:** Count of Eligibility\_Type.

The task pane also includes a search bar, a 'Defer Layout Update' checkbox, and an 'Update' button.

**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
<b>Grand Total</b>	<b>785</b>

The PivotTable Fields task pane shows the filter for "Eligibility\_Type" with the following options:

- Family\_Assessment\_Date
- Family\_Assessment\_NCR
- IFSP\_Date
- IFSP\_NCR
- Exit\_Date
- Exit\_Reason

The filter for "Eligibility\_Type" is set to "All". The filter for "IFSP\_Date" is set to "All". The filter for "Eligibility\_Type" has the following options:

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

The "OK" button is highlighted with a red box.

**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
<b>Grand Total</b>	<b>785</b>

The PivotTable Fields task pane shows the filter for "IFSP\_Date" with the following options:

- Family\_Assessment\_Date
- Family\_Assessment\_NCR
- IFSP\_Date
- IFSP\_NCR
- Exit\_Date
- Exit\_Reason

The filter for "IFSP\_Date" is set to "All". The filter for "Eligibility\_Type" is set to "All". The filter for "IFSP\_Date" has the following options:

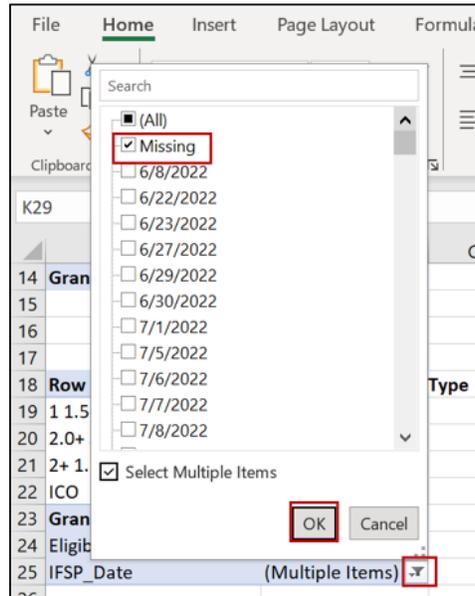
- (All)
- Missing
- 6/8/2022
- 6/22/2022
- 6/23/2022
- 6/27/2022
- 6/29/2022
- 6/30/2022
- 7/1/2022
- 7/5/2022
- 7/6/2022
- 7/7/2022
- 7/8/2022

The "OK" button is highlighted with a red box.

Row Labels	Count of Eligibility_Type	
<b>Grand Total</b>	<b>989</b>	<b>Total Eligible</b>
1.5-1.99 Standard Deviz	104	
2.0+ Standard Deviation I	348	
2+ 1.5-1.99 Standard Dev	20	
ICO	313	
<b>Grand Total</b>	<b>785</b>	<b>Total Eligible via Evaluation</b>
Eligibility_Type (Multiple Items)		
IFSP_Date (Multiple Items)		
<b>Count of Eligibility_Type</b>	<b>861</b>	<b>Total Eligible w/ IFSP</b>

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 an Excel PivotTable with 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
<b>Grand Total</b>	<b>128</b>	<b>128</b>

The PivotTable Fields task pane shows the following configuration:

- Filters:** Eligibility\_Type, IFSP\_Date
- Columns:** Values
- Rows:** Exit\_Reason
- Values:** Count of Eligibility\_Type, Count of Exit\_Reason

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 left sidebar contains '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'. The 'EI Services' link under the 'Early Intervention Reports' section is highlighted with a red box.

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 and status message are the same as in the previous screenshot. 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 asterisks are required. A small image of a child is visible in the left sidebar.

**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 'Remove Duplicates' button in the 'Data Tools' group is 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.

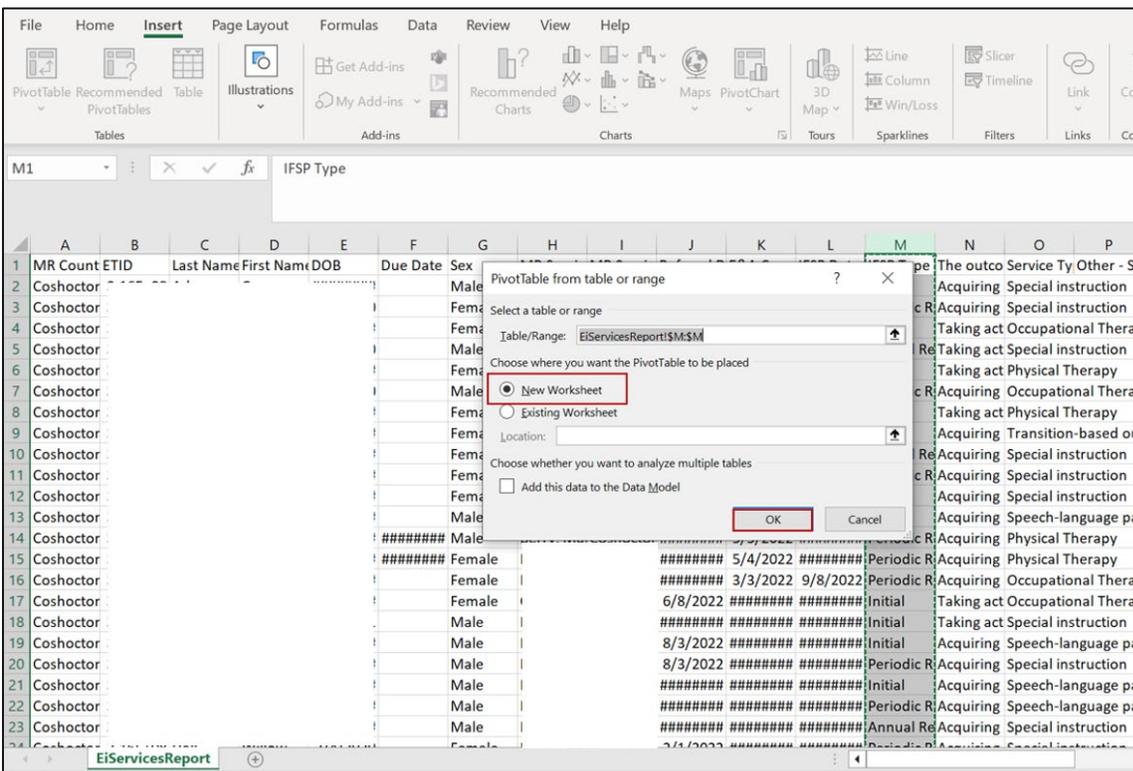
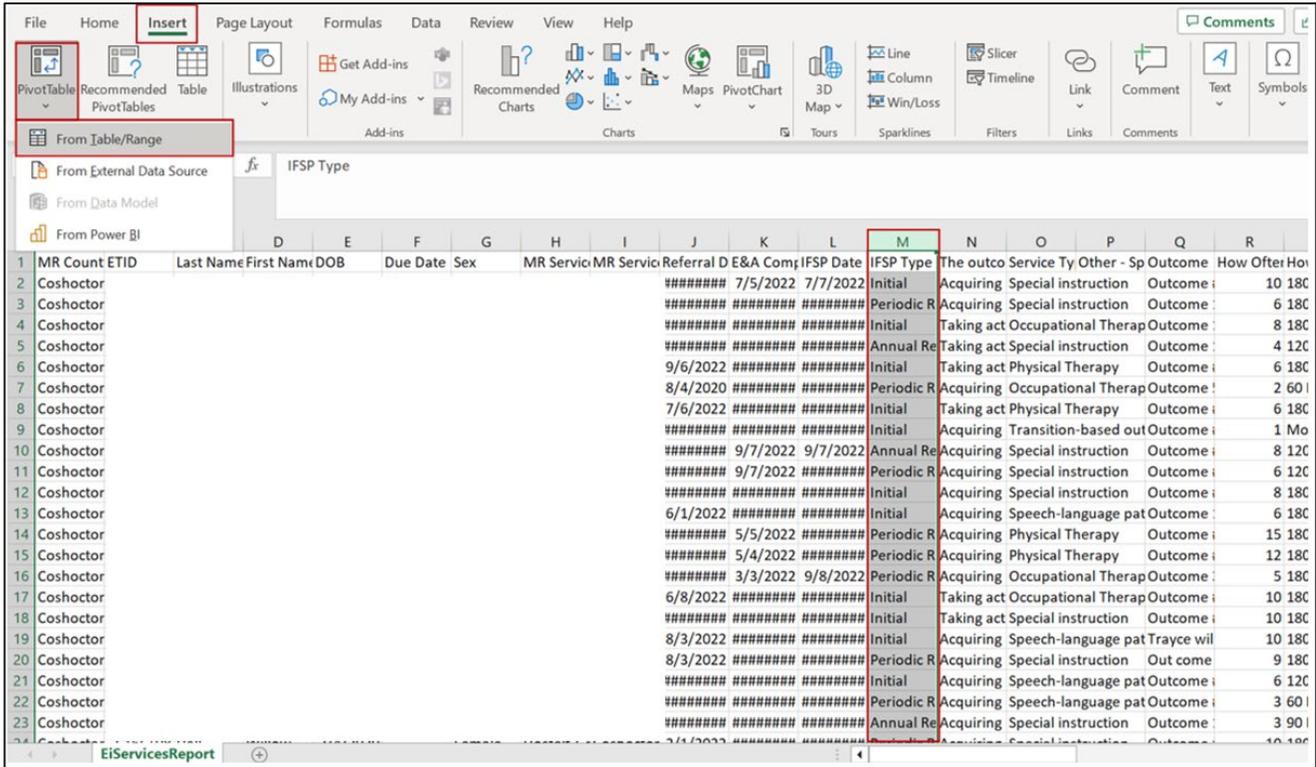
The background spreadsheet shows columns A through F with headers: MR County, ETID, Last Name, First Name, DOB, and Due Date. The data rows contain the name 'Coshocton' in column A and various dates and genders in columns E and F.

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
  - IFSP Type (highlighted with a blue box)
  - The outcome(s) below address(es)
- Buttons: OK (highlighted with a red box), Cancel.

The background spreadsheet shows columns A through F with headers: MR County, ETID, Last Name, First Name, DOB, and Due Date. The data rows contain the name 'Coshocton' in column A and various dates and genders in columns E and F.

**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 displays the Microsoft Excel interface. The PivotTable is located in the worksheet, with the following data:

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

The PivotTable Fields task pane on the right shows the configuration for the PivotTable. The field "IFSP Type" is selected and placed in the Rows area. The field "Count of IFSP Type" is placed in the Values area. Red arrows indicate the drag-and-drop actions from the task pane to the PivotTable.

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' icon is highlighted, and the 'From Table/Range' dropdown menu is open. The background spreadsheet shows a table with columns labeled 'NCR\_Child\_Assessment\_Date', 'Child\_Assessment\_NCR', 'Family\_Assessment\_Date', 'Family\_Assessment\_NCR', 'IFSP\_Date', 'IFSP\_NCR', 'Exit\_Date', and 'Exit\_Reason'. The 'IFSP\_NCR' column is highlighted in grey.

The screenshot shows the 'PivotTable from table or range' dialog box. The 'Table/Range' field contains the formula bar text: `rpt45DayComplianceMonitorReport!$O:$O`. The 'Choose where you want the PivotTable to be placed' section has the 'New Worksheet' radio button selected. The 'OK' button is highlighted with a red box.

**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)	
<b>Grand Total</b>	<b>368</b>

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. 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 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: Count (selected)
- Buttons: Number Format, OK, Cancel

The 'PivotTable Fields' task pane is visible on the right, showing the 'IFSP\_NCR' field in the Values area, with 'Sum of IFSP\_NCR' selected in the dropdown menu.

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 titled "Count of IFSP\_NCR". The PivotTable is structured as follows:

Row Labels	Count of IFSP_NCR
51	
52	
56	
(blank)	
<b>Grand Total</b>	

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

- Fields to add to report: IFSP\_NCR
- Filters: (empty)
- Columns: (empty)
- Rows: IFSP\_NCR
- Values: Count of IFSP\_NCR

The filter dropdown for "NCR Code" is open, showing the following options:

- (Select All)
- 51
- 52
- 56
- (blank)

The "OK" button at the bottom of the filter dropdown is highlighted with a red box.

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

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#### 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

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#### 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