



SERVICE COORDINATION OVERSIGHT REPORT GUIDE



**Department of
Children & Youth**

Help Me Grow Early Intervention

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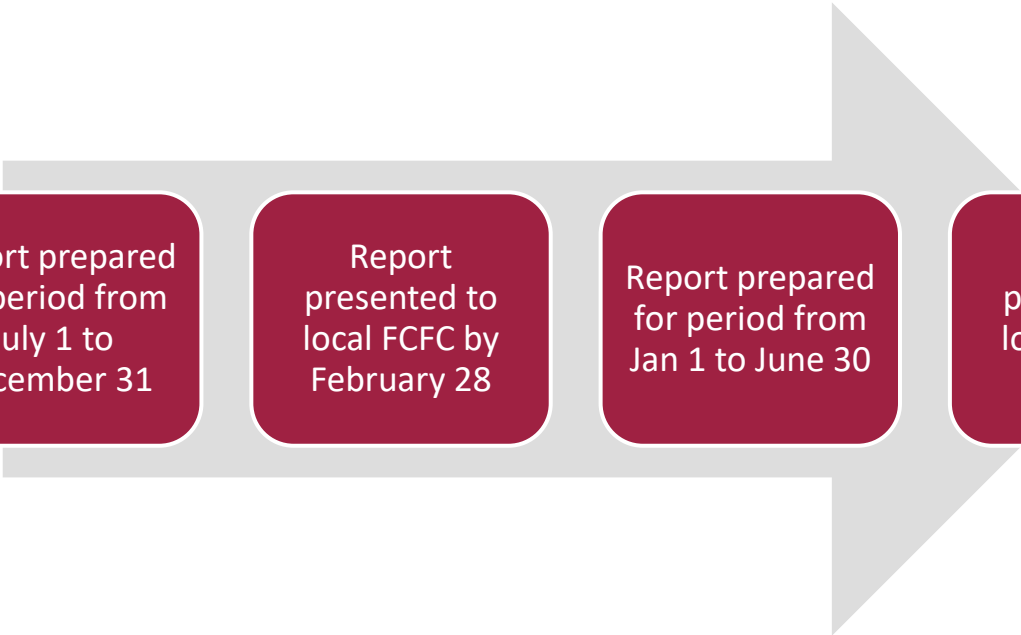
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SC Oversight Report Guide

Introduction

Early Intervention Contract Managers are required to complete and deliver the EI Service Coordination Oversight Report to their local Family and Children First Council, or FCFC, twice per year. The report provides 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 covers activities that occurred between July 1 and December 31 and must be shared with local council no later than February 28 of the following year. The second report covers activities that occurred from January 1 to June 30, and must be shared with local council no later than August 31 each year.

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 to
December 31

Report
presented to
local FCFC by
February 28

Report prepared
for period from
Jan 1 to June 30

Report
presented to
local FCFC by
August 31

REFERRALS

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

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

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

OUTREACH AND CHILD FIND ACTIVITIES

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

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

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

ELIGIBILITY

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

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

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

SERVICE COORDINATION

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

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

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

Figure 1: Addendum B EI Contact Sheet

INDIVIDUALIZED FAMILY SERVICE PLANS (IFSPs)

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

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

EI SERVICES

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

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

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

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

Service(s) Not Yet Coordinated

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

Please update the selected service's information.

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

Save Service Cancel

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

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Filter' icon in the ribbon is highlighted with a red box. Below the ribbon, the 'IFSP Added Date' column is selected, and the 'Filter' task pane is open. The 'Date Filters' section is expanded, and the months from July to December are selected. The 'Filter' icon in the ribbon is also highlighted.

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 Department-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 DCY-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, DCY 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 DCY 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.

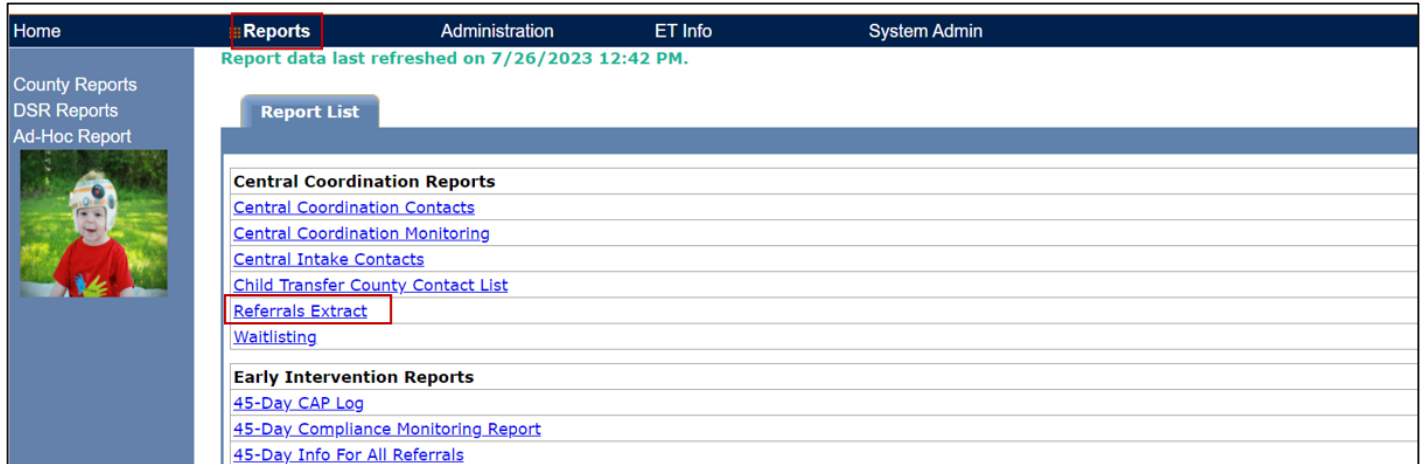
Each Spring, DCY sends out county APR and determinations reports and memos to Contract Managers and FCFC Coordinators via email. The information is later uploaded to the EI website for future reference. To locate your county's determination, visit the Ohio EI website at www.ohioearlyintervention.org/county-data.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

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

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

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

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



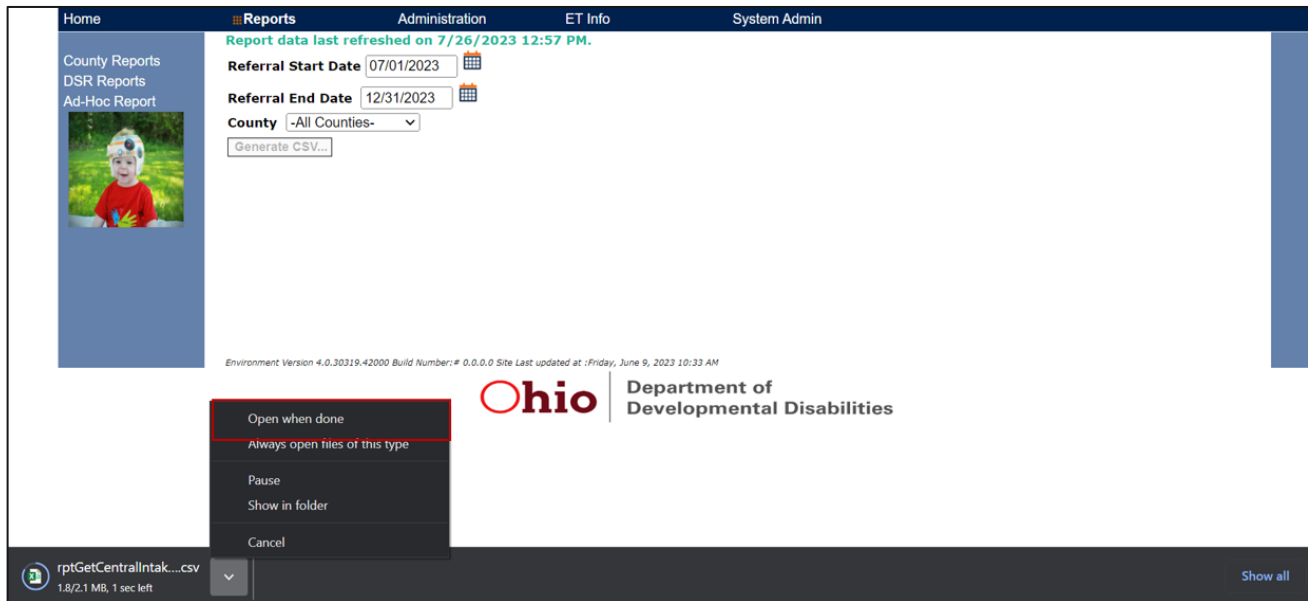
The screenshot shows the EIDS application interface. The top navigation bar includes 'Home', 'Reports' (highlighted with a red box), 'Administration', 'ET Info', and 'System Admin'. Below the navigation bar, a status message reads 'Report data last refreshed on 7/26/2023 12:42 PM.' A 'Report List' tab is active. The list contains two main sections: 'Central Coordination Reports' and 'Early Intervention Reports'. Under 'Central Coordination Reports', the links are: '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 links are: '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”

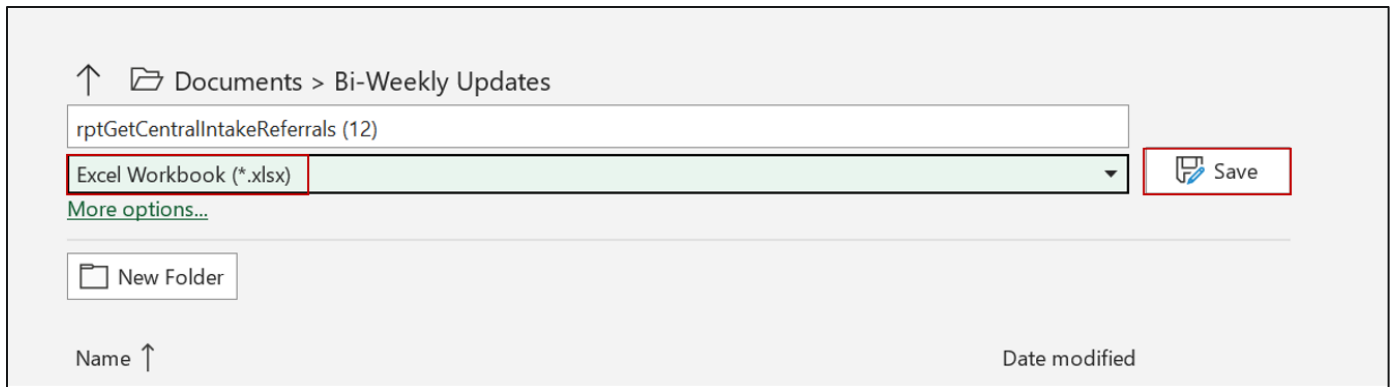


The screenshot shows the EIDS application interface with the 'Referrals Extract' report selected. The top navigation bar is the same as in the previous screenshot. Below the navigation bar, the status message reads 'Report data last refreshed on 7/26/2023 12:41 PM.' The 'Referral Start Date' is set to '07/01/2023' and the 'Referral End Date' is set to '12/31/2023', both dates are highlighted with red boxes. The 'County' dropdown menu is set to '-All Counties-' and is also highlighted with a red box. A 'Generate CSV' button is visible below the dropdown. At the bottom of the page, the footer text reads 'Environment Version 4.0.30319.42000 Build Number: # 0.0.0.0 Site Last updated at :Friday, June 9, 2023 10:33 AM'. The Ohio Department of Developmental Disabilities logo is displayed at the bottom right.

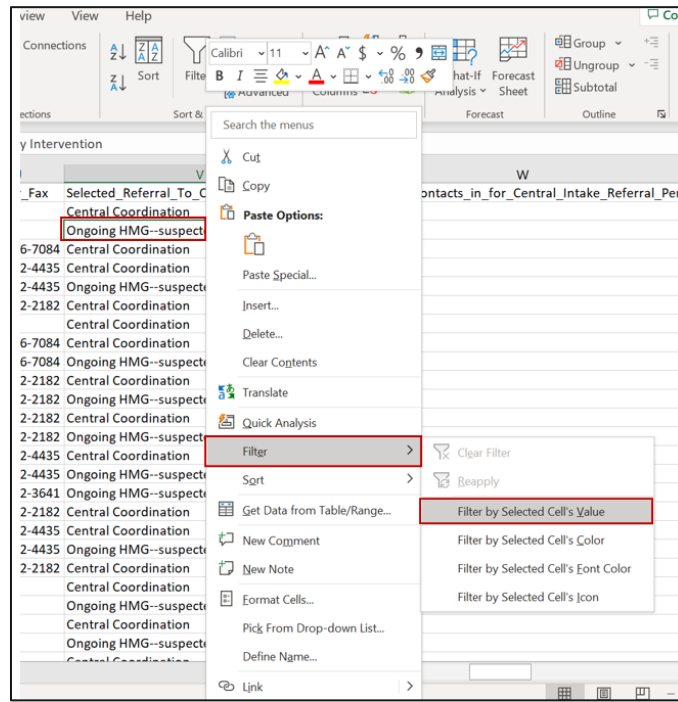
Step 4: When the report has downloaded, click “Open”



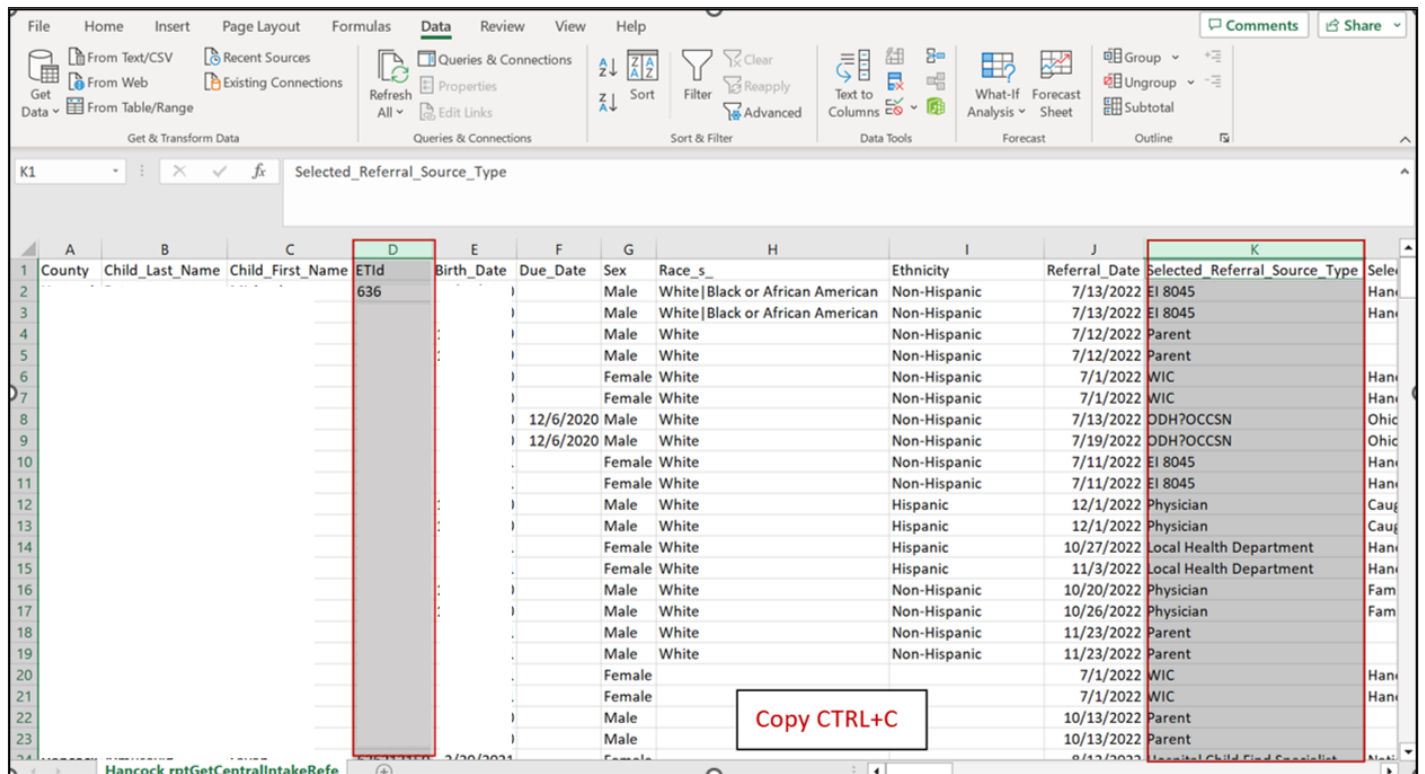
Step 5: To utilize all functionality, save the file as an Excel file by clicking “Save As” and selecting the desired location. Type in the file name and select “Excel Workbook” in the “Save as type” field. Then press “Save”



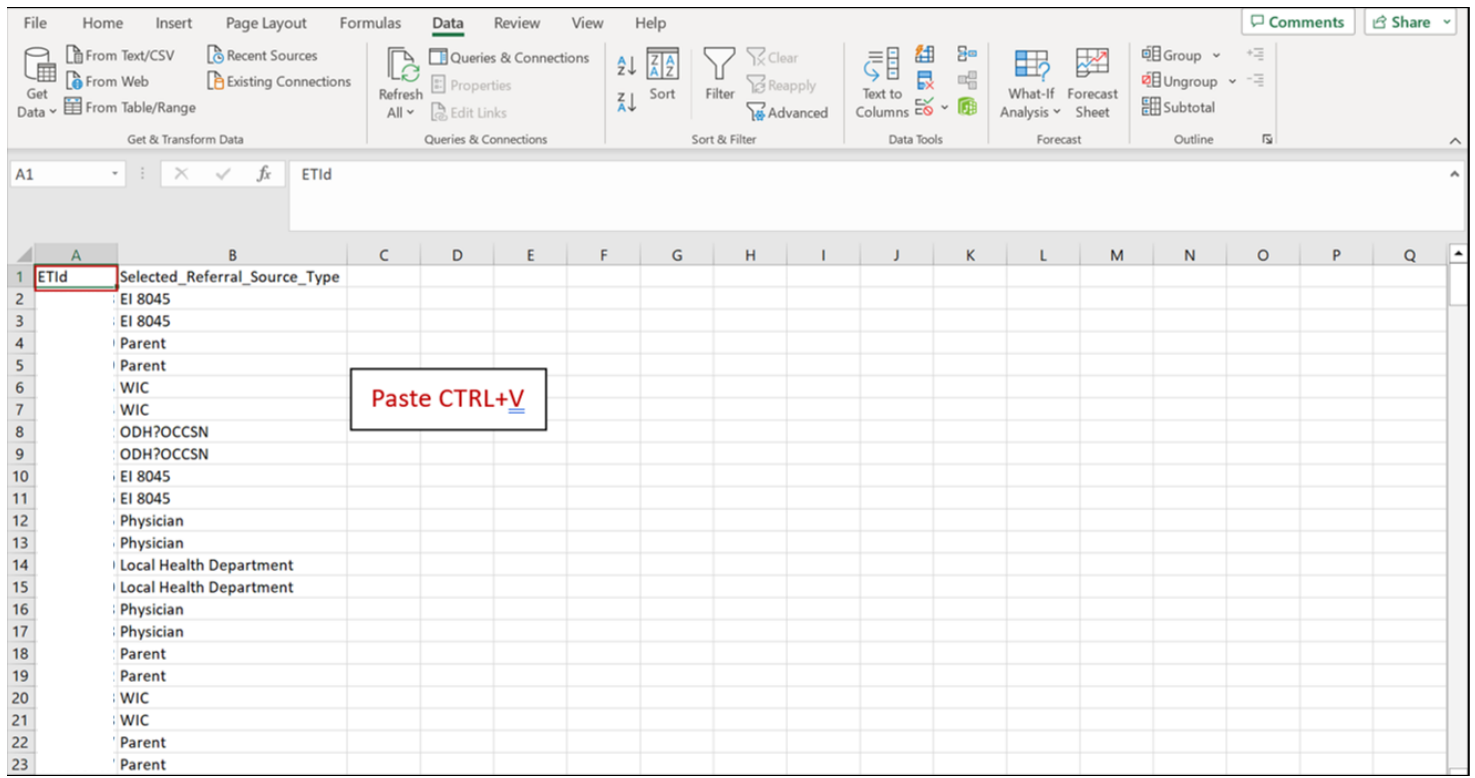
Step 6: Open spreadsheet, go to any cell within “Selected_Referrals_To_Category” column that contains “Ongoing HMG -- Suspected EI,” right click, go to filter, select “Filter by Selected Cell’s Value”. This will filter the data to display only EI referrals



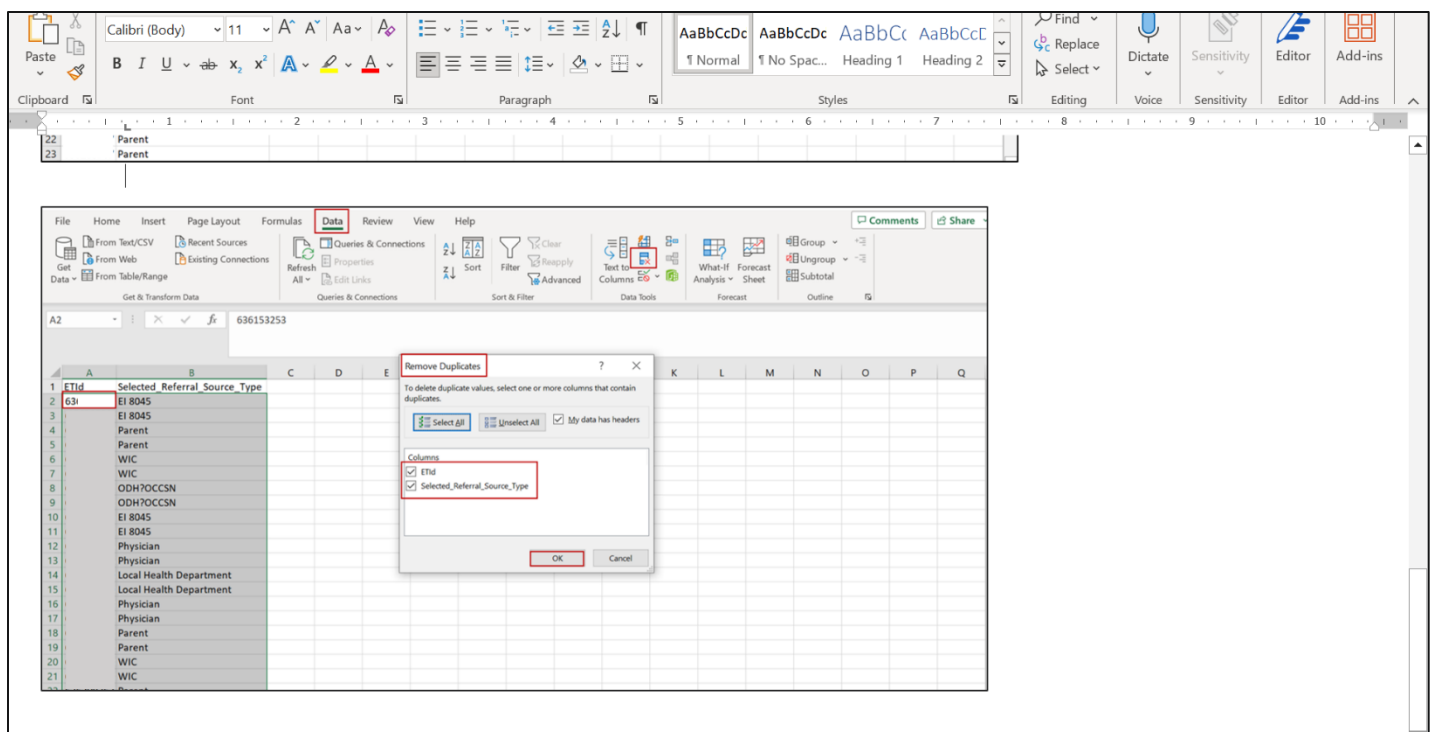
Step 7: Highlight column D with “ETId” and Column K with “Selected_Referral_Source_Type” (hold down Ctrl key to highlight both columns), click Ctrl+C to copy



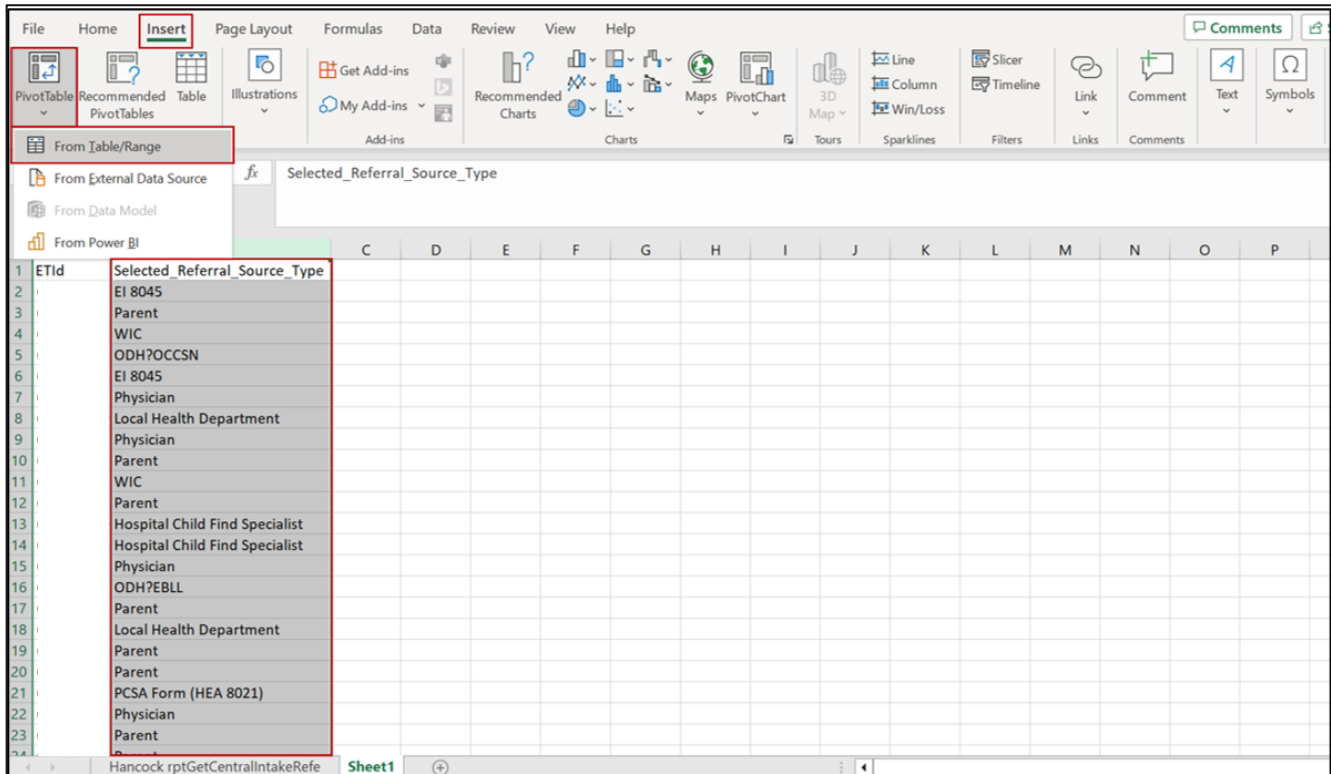
Step 8: Open new worksheet, go to cell A1, click Ctrl+V to paste copied columns



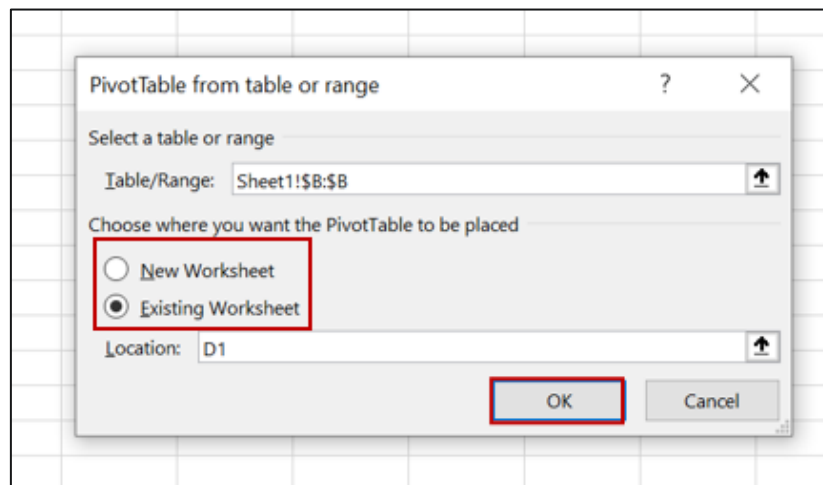
Step 9: Next, go to “Data” tab, and click “Remove Duplicates”; When “Remove Duplicates” box pops up, ensure that both “ETId” and “Referral Source Name” columns are selected, and click “OK”. (A pop up should tell you how many blank cells, if any, have been replaced)



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

The PivotTable Fields task pane on the right shows:

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

Annotations in the image include:

- A bracket on the right side of the PivotTable rows (from row 2 to 16) labeled "# of referrals from each referral source".
- A circle around the "Grand Total" value of 154, with a label "Total # of referrals".

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

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

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

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

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

The screenshot shows the '45-Day Compliance Monitoring Report' form. The top navigation bar is the same as in the previous screenshot. A message states 'Report data last refreshed on 7/24/2023 9:31 AM.' The left sidebar is also the same. The main content area is titled '45-Day Compliance Monitoring Report' and contains a form with the following fields: 'County' (dropdown menu set to 'Marion'), 'Contract' (dropdown menu set to 'Early Intervention (Marion County Early Inte...)', 'Agency' (dropdown menu set to 'ALL'), 'Worker' (dropdown menu), '*Date Option' (radio buttons, with '45-Day Timeline Ends' selected and highlighted with a red box), '*Report Start Date' (text box set to '07/01/2022'), '*Report End Date' (text box set to '12/31/2022'), '*Report Type' (radio buttons, with 'Data Extract' selected and highlighted with a red box), and '*Report Format' (text box set to 'EXCEL'). A 'Get Report...' button is located in the top right corner of the form area. A red box highlights the 'Get Report...' button. At the bottom of the form, a note states '* Indicates required field.' The footer of the page includes the 'Ohio Department of Developmental Disabilities' logo and text: 'Environment Version 4.0.30319.42000 Build Number: 0.0.0.0 Site Last updated at: Friday, June 9, 2023 10:32 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 shows the Microsoft Excel interface. The ribbon at the top includes File, Home, Insert, Page Layout, Layout, Formulas, Data, Review, View, and Help. The 'Home' ribbon is active, showing options for Clipboard, Font, Paragraph, Styles, Cells, and Editing. The 'Find & Select' button in the Editing group is highlighted with a red box. A dropdown menu is open, showing options like Go To, Go To Special, Formulas, Notes, Conditional Formatting, Constants, Data Validation, Select Objects, and Selection Pane. The 'Replace...' option is highlighted with a red box. Below the ribbon, a data table is visible with columns M, N, O, P, Q, R, and S. Column Q is highlighted in green. The table contains data for Family Assessment, Exit Date, Exit Reason, Exit Destination, and Service. The 'Exit Reason' column is highlighted in green. The 'Exit Reason' column contains various reasons for exit, such as 'Family refused program requirements', 'Reached Age 3, Part B eligibility not determined', 'Child/Family not eligible', 'Reached Age 3, Part B Eligible', 'Family no longer interested', 'Family refused program requirements', 'Family no longer interested', 'Reached Age 3, Not Eligible for Part B, exit with no referral', 'Unable to contact family', 'Reached Age 3, Part B Eligible', 'Family no longer interested', 'Child/Family not eligible', 'Family no longer interested', 'Unable to contact family', 'Reached Age 3, Part B Eligible', 'Reached Age 3, Part B Eligible', 'Reached Age 3, Part B Eligible', 'Reached Age 3, Part B Eligible', 'Family no longer interested', 'Reached Age 3, Not Eligible for Part B, exit to other program', and 'Loss of contact with family'. The 'Exit Destination' column contains values like 'Home', 'No Destination Identified', 'Public Preschool', and 'Child Care Center'. The 'Service' column contains values like 'Home', 'Public Preschool', and 'Child Care Center'.

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 set to find blank cells (Find what is empty) and replace them with "Not Yet Exited". The "Replace All" button is highlighted with a red box. The spreadsheet data is as follows:

	M	N	O	P	Q	R
	Family_Assessment_NCR	IFSP_Date	IFSP_NCR	Exit_Date	Exit_Reason	Exit_Destination
1		Missing		11/12/2022	Family refused program requirements	Home
2		7/15/2022	51	10/17/2022	Reached Age 3, Part B eligibility not determined	Home
3		Missing		7/21/2022	Find and Replace	Destination Identified
4		7/6/2022		11/14/2022		Public Preschool
5		7/6/2022		11/14/2022		Public Preschool
6		Missing		10/11/2022		Destination Identified
7		Missing		8/30/2022		ne
8		Missing		11/15/2022		ne
9		11/29/2022		12/31/2022		ne
10		Missing		10/22/2022		Destination Identified
11		9/21/2022		11/19/2022		Public Preschool
12		Missing		1/4/2023		Public Preschool
13		Missing		10/30/2022		Destination Identified
14		51	9/19/2022	51	11/5/2022	ne
15		Missing		8/22/2022		Destination Identified
16		9/7/2022	51	2/19/2023	Reached Age 3, Part B Eligible	No Destination Identified
17		9/15/2022	51	3/30/2023	Reached Age 3, Part B Eligible	Public Preschool
18		8/24/2022		4/20/2023	Reached Age 3, Part B Eligible	Public Preschool
19		8/23/2022		4/14/2023	Reached Age 3, Part B Eligible	Public Preschool
20		Missing		10/11/2022	Family no longer interested	Home
21		7/20/2022		10/26/2022	Reached Age 3, Not Eligible for Part B, exit to other program	Child Care Center
22		7/25/2022	51	11/3/2022	Loss of contact with family	No Destination Identified
23		8/6/2022	51	5/20/2023	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 shows the Microsoft Excel interface with the **Insert** tab selected. The **PivotTable** option is highlighted in the **PivotTables** group. Below the ribbon, the **From Table/Range** option is selected in the **PivotTable** task pane. The worksheet displays a table with the following data:

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		

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

The screenshot shows the Microsoft Excel interface with the PivotTable Analyze ribbon selected. A PivotTable is displayed in the worksheet, with the formula bar showing 'Count of Referral_Date' and the value '1322'. The PivotTable Fields task pane is open on the right, showing the 'Referral_Date' field selected and dragged to the 'Values' area, where it is labeled 'Count of Referral_Date'.

Count of Referral_Date
1322

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 on the right. The PivotTable is located in the worksheet, and the task pane shows the following configuration:

- Choose fields to add to report:** Search bar, list of fields including ETID, Previous_ETID, Child_Name, Date_Of_Birth, **Referral_Date** (checked), and Day45_Timeline_Ends.
- Drag fields between areas below:**
 - Filters:** (Empty)
 - Columns:** (Empty)
 - Rows:** (Empty)
 - Σ Values:** **Count of Referral_Date** (selected)
- Defer Layout Update:** (Unchecked)
- Update:** (Button)

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

The screenshot shows the Excel interface with the PivotTable Fields task pane on the right. The PivotTable is located in the worksheet, and the task pane shows the following configuration:

- Choose fields to add to report:** Search bar, list of fields including Date_Of_Birth, Referral_Date, Day45_Timeline_Ends, **Eligibility_Type** (checked), EligibilityCriteriaDate, Eligibility_NCR, and Child_Name.
- Drag fields between areas below:**
 - Filters:** (Empty)
 - Columns:** (Empty)
 - Rows:** **Eligibility_Type** (selected)
 - Σ Values:** **Count of Eligibility_Type** (selected)
- Defer Layout Update:** (Unchecked)
- Update:** (Button)

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
Grand Total	1054

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

The screenshot shows the Microsoft Excel interface with the PivotTable Fields task pane on the right and the Row Labels filter menu open. The task pane shows the following fields:

- Child_Name
- Date_Of_Birth
- Referral_Date
- Day45_Timeline_Ends
- ☒ Eligibility_Type
- EligibilityCriteriaDate

The Row Labels filter menu shows the following options:

- (Select All)
- ☒ 1 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 PivotTable Fields task pane shows the following fields:

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

The Row Labels filter menu is open, and the 'Not Eligible' and '(blank)' options are unselected. The 'OK' button is highlighted.

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

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. In the task pane, under the 'Filters' section, 'Dx on Form' and 'Dx on List' are unselected, while 'ICO' is selected. The PivotTable is located in the worksheet area, with 'Count of Eligibility_Type' as the row label and 'Count of Eligibility_Type' as the value field. The data is as follows:

Count of Eligibility_Type	Count of Eligibility_Type
104	
348	
20	
72	
132	
308	
984	

The worksheet also shows a list of row labels in column A, including 'Dx on Form', 'Dx on List', and 'ICO'. The 'Grand Total' row shows a count of 984.

The screenshot shows the Excel interface with a PivotTable and a summary table. The PivotTable is located in the worksheet area, with 'Count of Eligibility_Type' as the row label and 'Count of Eligibility_Type' as the value field. The data is as follows:

Count of Eligibility_Type	Count of Eligibility_Type
104	
348	
20	
71	
133	
313	
989	

The worksheet also shows a list of row labels in column A, including 'Dx on Form', 'Dx on List', and 'ICO'. The 'Grand Total' row shows a count of 989.

Below the PivotTable, there is a summary table with the following data:

Summary	Count
Total # of referrals w/ 45-day timeline ending during reporting period	1322
Total Eligible	989
Total Eligible via Evaluation	785

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

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

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

The screenshot displays the Microsoft Excel interface. The main window shows a PivotTable with the following data:

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

Below the PivotTable, a new PivotTable is being created with the following data:

Count of Eligibility_Type
989

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

- Choose fields to add to report:** Search bar.
- Available Fields:** ETID, Previous_ETID, Child_Name, Date_Of_Birth, Referral_Date, Day45_Timeline_Ends, Eligibility_Type (checked).
- Drag fields between areas below:**
 - Filters:** Eligibility_Type (indicated by a red box and arrow).
 - Columns:** (Empty)
 - Rows:** (Empty)
 - Values:** Count of Eligibility_Type (indicated by a red arrow).
- Defer Layout Update:** (Unchecked)
- Update:** (Button)

Microsoft Excel interface showing a PivotTable and the PivotTable Fields task pane.

Worksheet: Count of Eligibility_Type

Row Labels	Count of Eligibility_Type
1 1.5-1.99 Standard Dev	104
2 2.0+ Standard Deviation	348
2+ 1.5-1.99 Standard Dev	20
ICO	313
Grand Total	785
Eligibility_Type (Multiple Items)	
IFSP_Date (All)	

Total Eligible via Evaluation

PivotTable Fields

Choose fields to add to report:

- ☐ Family_Assessment_Date
- ☐ Family_Assessment_NCR
- ☒ IFSP_Date
- ☐ IFSP_NCR
- ☐ Exit_Date
- ☐ Exit_Reason

Drag fields between areas below:

Filters: Eligibility_Type, IFSP_Date

Columns:

Rows:

Values: Count of Eligibility_Type

☐ Defer Layout Update Update

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

The screenshot shows the Microsoft Excel interface with the PivotTable Fields task pane on the right. The PivotTable is titled "Count of Eligibility_Type" and is located in the range A17:K23. The PivotTable data is as follows:

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

The PivotTable Fields task pane shows the following fields:

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

The "Eligibility_Type" field is in the Filters area. The "IFSP_Date" field is in the Columns area. The "Count of Eligibility_Type" field is in the Values area.

The "Eligibility_Type" filter dropdown menu is open, showing 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 "Not Eligible" and "(blank)" options are highlighted with a red box. The "OK" button is also 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 Microsoft Excel interface with the PivotTable Fields task pane on the right. The PivotTable is titled "Count of Eligibility_Type" and is located in the range A17:K23. The PivotTable data is as follows:

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

The PivotTable Fields task pane shows the following fields:

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

The "Eligibility_Type" field is in the Filters area. The "IFSP_Date" field is in the Columns area. The "Count of Eligibility_Type" field is in the Values area.

The "IFSP_Date" filter dropdown menu is open, showing the following options:

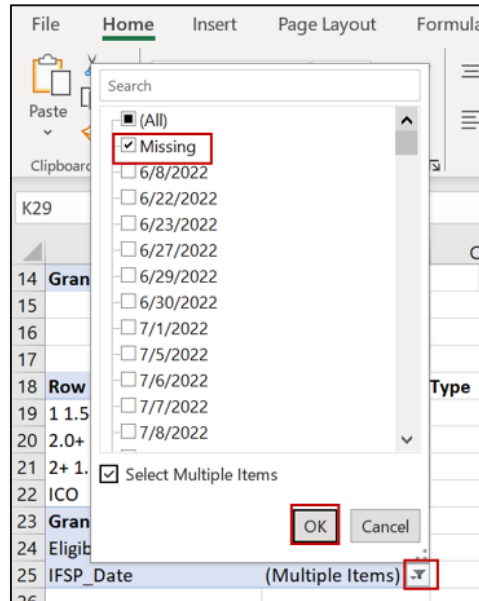
- (All)
- ☐ Missing
- ☒ 6/8/2022
- ☒ 6/22/2022
- ☒ 6/23/2022
- ☒ 6/27/2022
- ☒ 6/29/2022
- ☒ 6/30/2022
- ☒ 7/1/2022
- ☒ 7/5/2022
- ☒ 7/6/2022
- ☒ 7/7/2022
- ☒ 7/8/2022

The "Missing" option is highlighted with a red box. The "OK" button is also highlighted with a red box.

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<div> <div>Clipboard</div> <div>Font</div> <div>Alignment</div> <div>Number</div> <div>Styles</div> <div>Cells</div> <div>Editing</div> <div>Sensitivity</div> <div>Add-ins</div> </div>																		
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<div> <div> <div>Calibri</div> <div>11</div> <div>A^A</div> </div> <div> <div>B</div> <div>I</div> <div>U</div> <div></div> <div></div> <div></div> </div> <div> <div>General</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div> <div>Conditional Formatting</div> <div>Format as Table</div> <div>Cell Styles</div> </div> <div> <div>Insert</div> <div>Delete</div> <div>Format</div> </div> <div> <div>Σ</div> <div>Sort & Filter</div> <div>Find & Select</div> </div> <div> <div>Sensitivity</div> <div>Add-ins</div> </div> </div>																		
<div> <div> <div>K29</div> <div></div> <div></div> </div> <div> <div></div> <div></div> <div></div> </div> </div>																		
14	Grand Total	989	Total Eligible															
15																		
16																		
17																		
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)																
26																		
27	Count of Eligibility_Type																	
28		861	Total Eligible w/ IFSP															
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<div> <div>Sheet1</div> <div>rpt45DayComplianceMonitorReport</div> </div>																		

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.*

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* 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
Grand Total	128	128

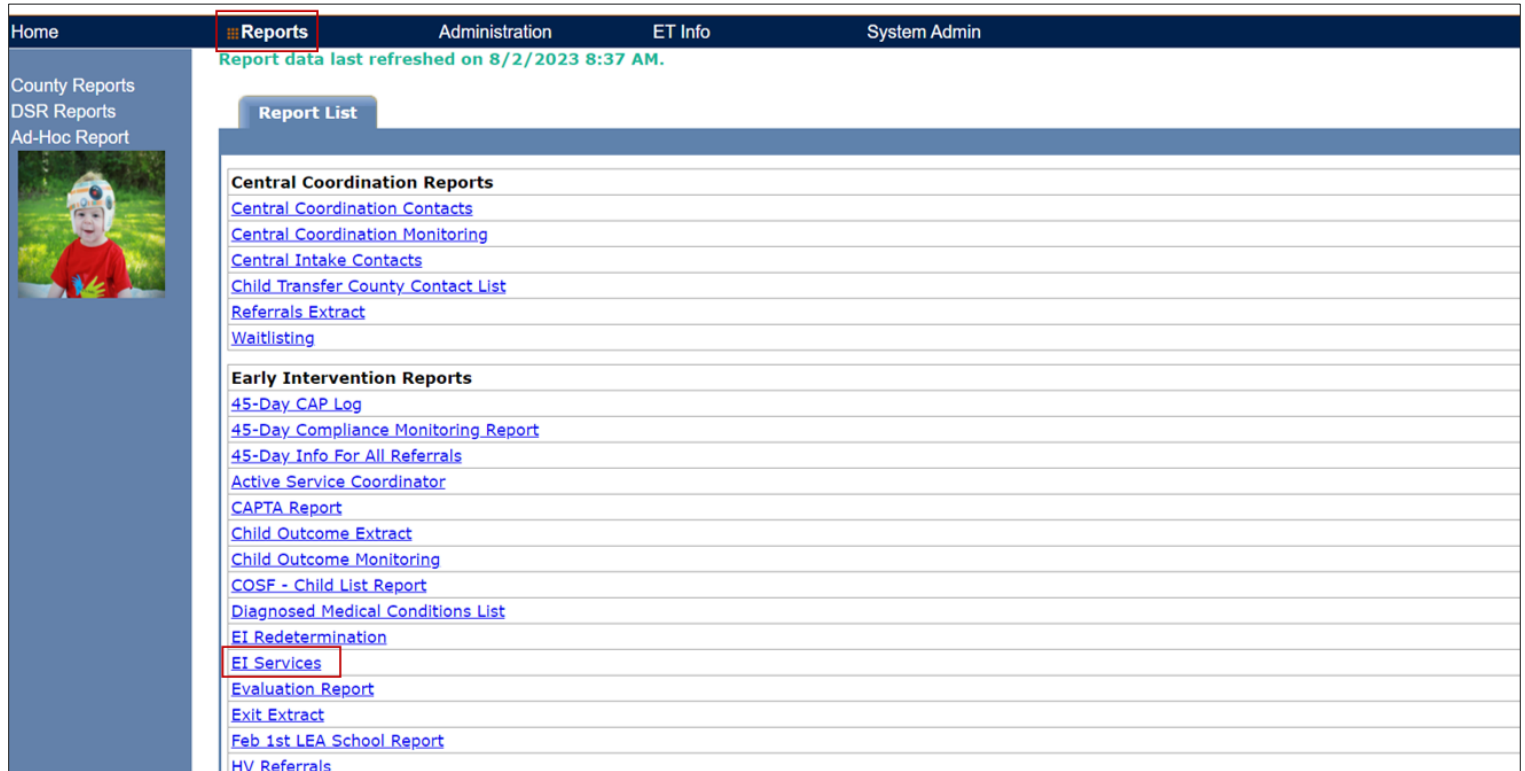
The PivotTable Fields task pane on the right shows the following configuration:

- Fields list:** IFSP_NCR, Exit_Date, **Exit_Reason** (checked), Exit_Destination, Service_Coordinator, Service_Coordinator_Agency.
- Filters:** Eligibility_Type, IFSP_Date.
- 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

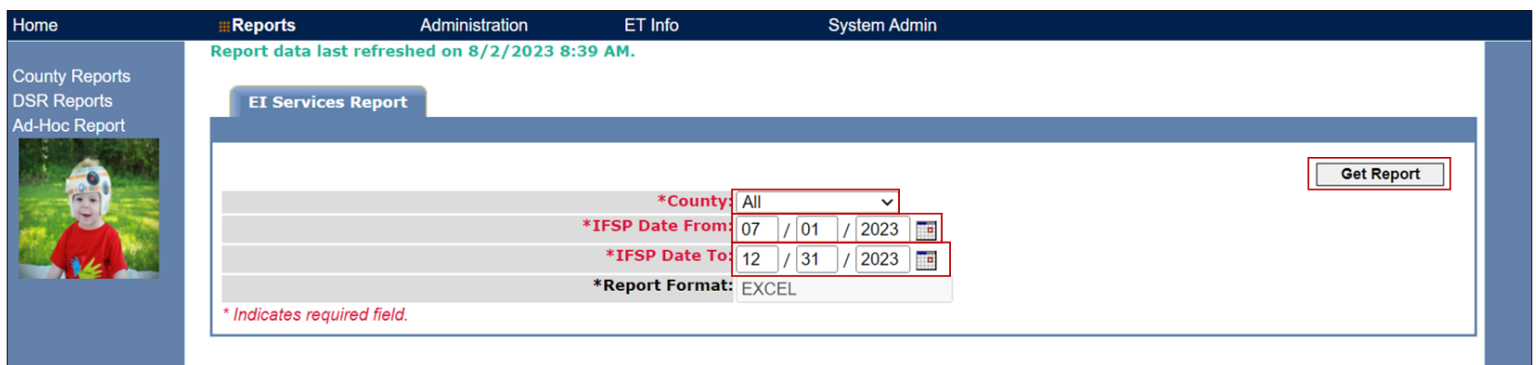
Step 1: Go to EIDS, “Reports”, and select “EI Services Report”



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

Report List
Central Coordination Reports
Central Coordination Contacts
Central Coordination Monitoring
Central Intake Contacts
Child Transfer County Contact List
Referrals Extract
Waitlisting
Early Intervention Reports
45-Day CAP Log
45-Day Compliance Monitoring Report
45-Day Info For All Referrals
Active Service Coordinator
CAPTA Report
Child Outcome Extract
Child Outcome Monitoring
COSF - Child List Report
Diagnosed Medical Conditions List
EI Redetermination
EI Services
Evaluation Report
Exit Extract
Feb 1st LEA School Report
HV Referrals

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 top navigation bar is the same as in the previous screenshot. The left sidebar also remains the same. The main content area is titled 'EI Services Report' and contains a form with the following fields:

- *County:** A dropdown menu with 'All' selected.
- *IFSP Date From:** A date field with '07 / 01 / 2023' entered.
- *IFSP Date To:** A date field with '12 / 31 / 2023' entered.
- *Report Format:** A dropdown menu with 'EXCEL' selected.

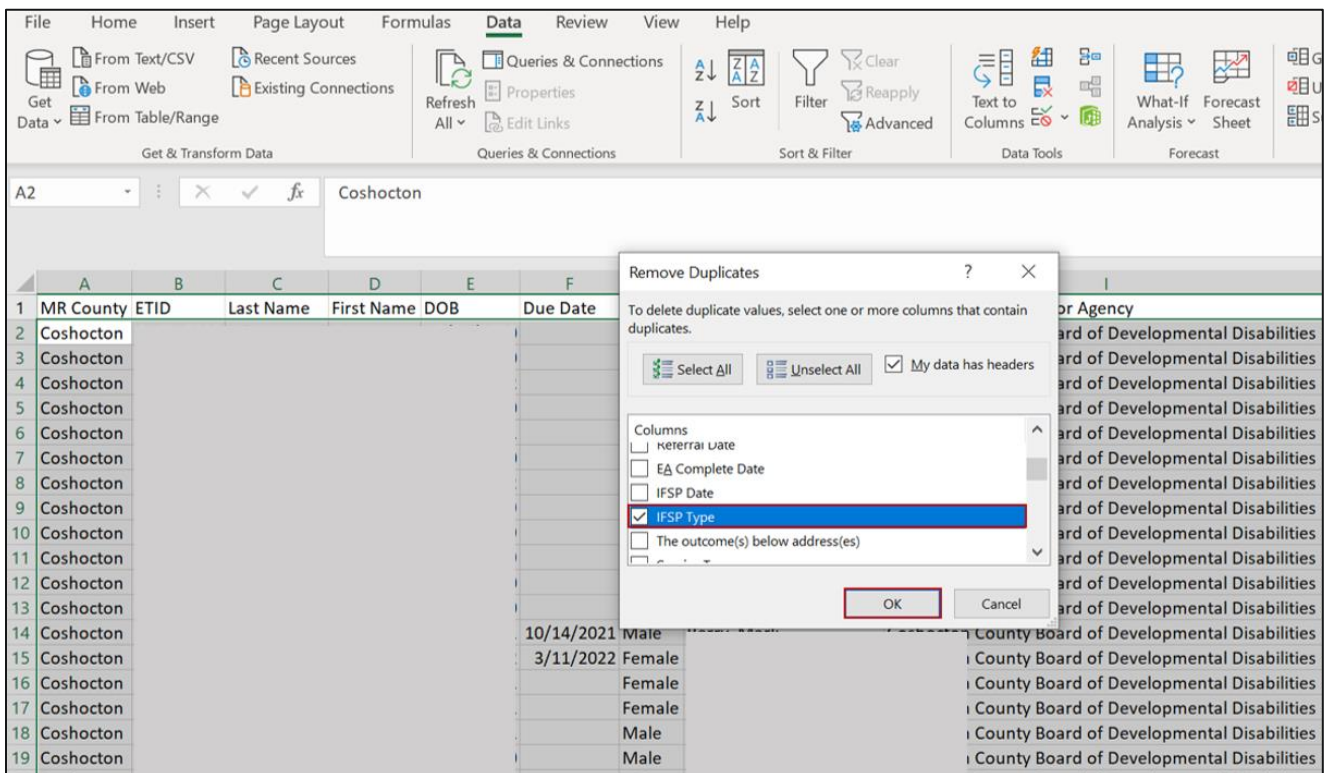
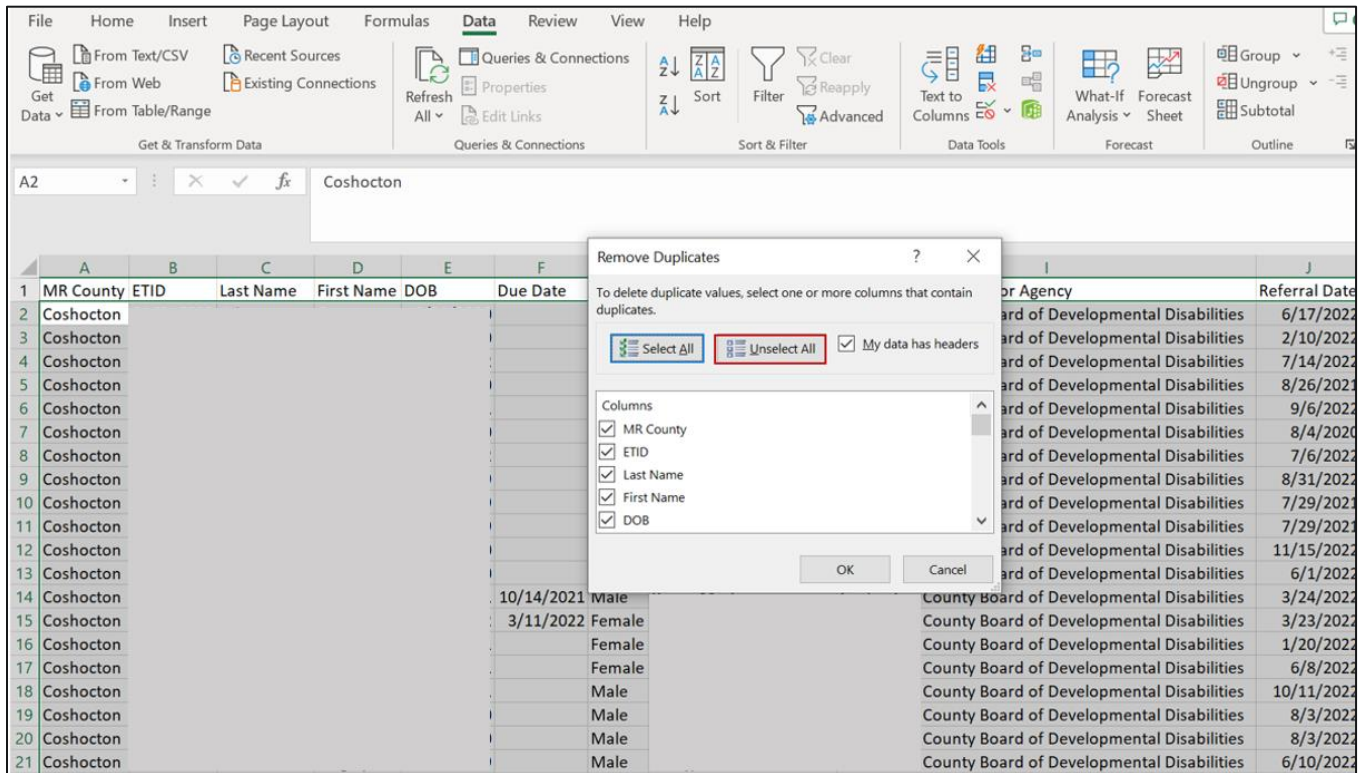
A 'Get Report' button is located to the right of the form fields. A red box highlights the 'Get Report' button. A note at the bottom left of the form states: '* Indicates required field.'

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”

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	
Coshocton						Female		County Board of Developmental Disabilities	3/1/2022	

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”

The screenshot shows the Microsoft Excel interface with the **Insert** tab selected. The **PivotTable** dropdown menu is open, and the **From Table/Range** option is highlighted. The background data table has the following columns: MR Count ETID, Last Name, First Name, DOB, Due Date, Sex, MR Service, MR Service Referral Date, E&A Com, IFSP Date, IFSP Type, The outco, Service Ty, Other - Sp, Outcome, and How Ofte. The **IFSP Type** column is highlighted in green.

The screenshot shows the Microsoft Excel interface with the **Insert** tab selected. The **PivotTable from table or range** dialog box is open. The **Table/Range** is set to **EIServicesReport\$M:\$M**. The **New Worksheet** option is selected under **Choose where you want the PivotTable to be placed**. The background data table is visible with the **IFSP Type** column highlighted in green.

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

The screenshot displays the Excel interface with the PivotTable Fields task pane open. The PivotTable is structured as follows:

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

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

- Choose fields to add to report:** IFSP Type
- Drag fields between areas below:**
 - Rows:** IFSP Type
 - Values:** Count of IFSP Type

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.

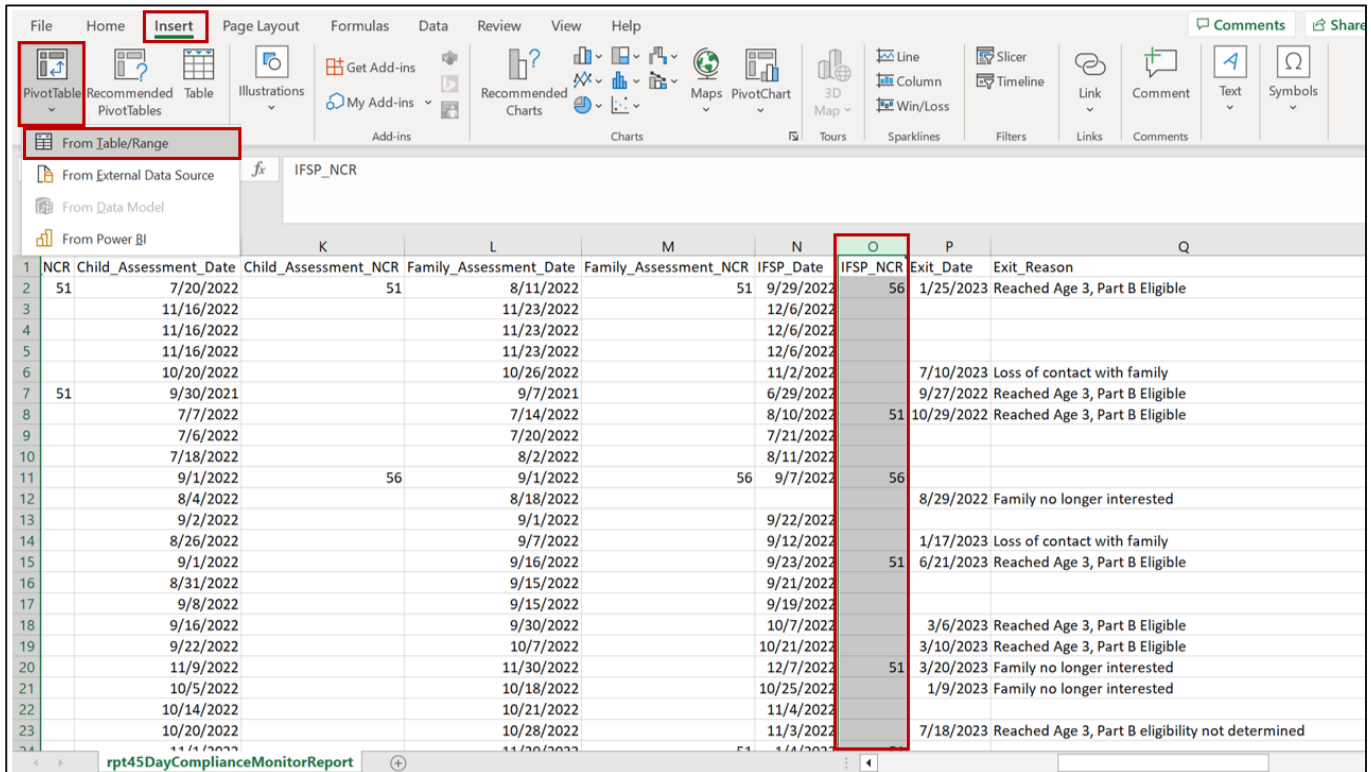
Get Report

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

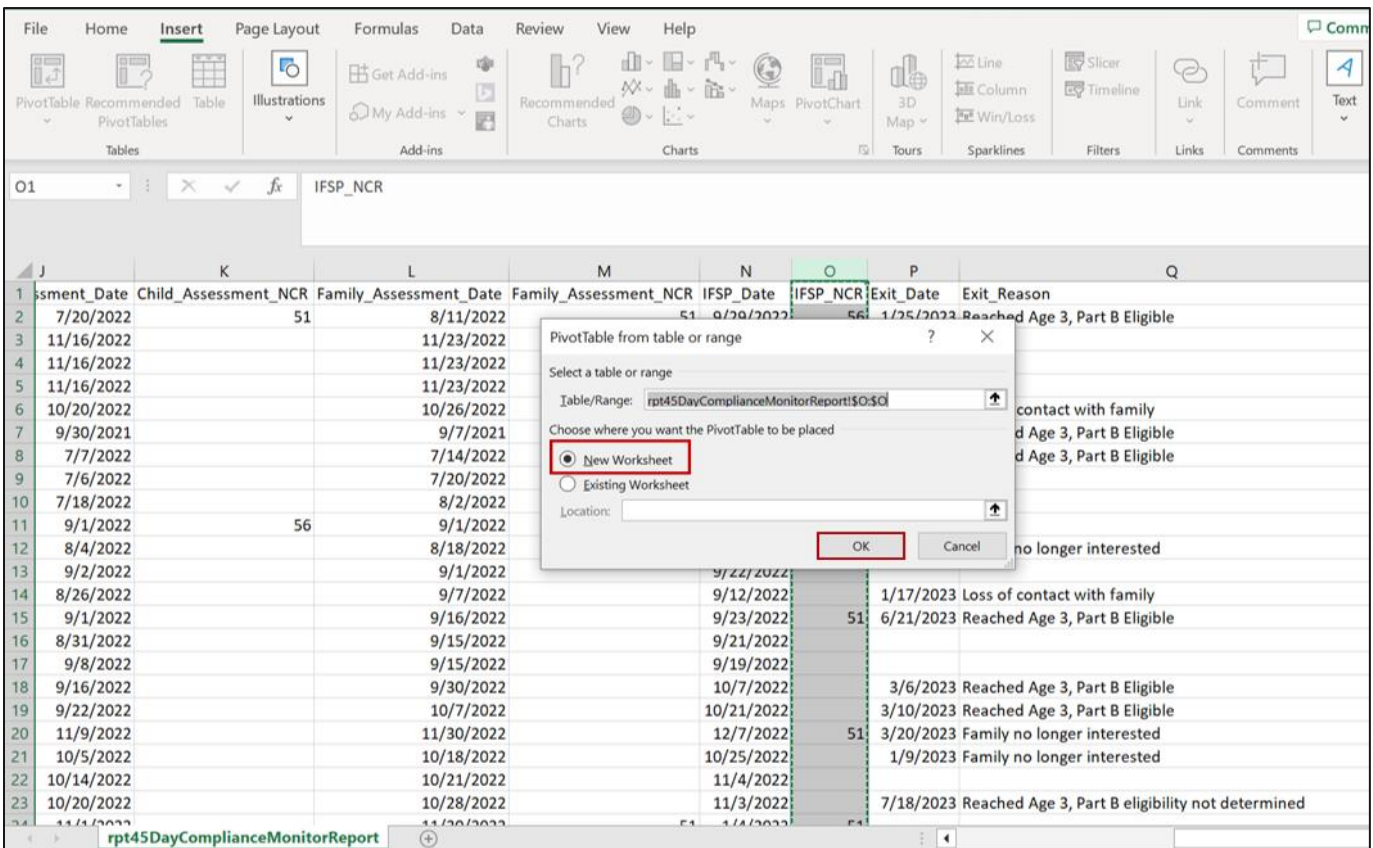
Step 3: When report has downloaded, open and save as “Excel Workbook” (see Step 5 from Appendix A for detailed instructions)

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 Excel 'Insert' tab with the 'PivotTable' button highlighted. The 'From Table/Range' option is selected in the dropdown menu. The data source is 'IFSP_NCR'.

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



The screenshot shows the 'PivotTable from table or range' dialog box. The 'Table/Range' is 'rpt45DayComplianceMonitorReport!\$O:\$Q'. The 'New Worksheet' option is selected under 'Choose where you want the PivotTable to be placed'. The 'OK' button is highlighted.

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

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

The screenshot displays an Excel worksheet with a PivotTable and the PivotTable Fields task pane. The PivotTable is titled "Sum of IFSP_NCR" and is located in the range B3:M8. The data is as follows:

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

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

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

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

The screenshot shows the Microsoft Excel interface with a PivotTable and the Value Field Settings dialog box open.

PivotTable Data:

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

Value Field Settings Dialog Box:

- Source Name: IFSP_NCR
- Custom Name: Count of IFSP_NCR
- Summarize Values By: **Count** (selected)
- Summarize value field by: Choose the type of calculation that you want to use to summarize data from the selected field.
 - Sum
 - Count** (selected)
 - Average
 - Max
 - Min
 - Product
- Buttons: Number Format, **OK** (highlighted), Cancel

PivotTable Fields Task Pane:

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

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

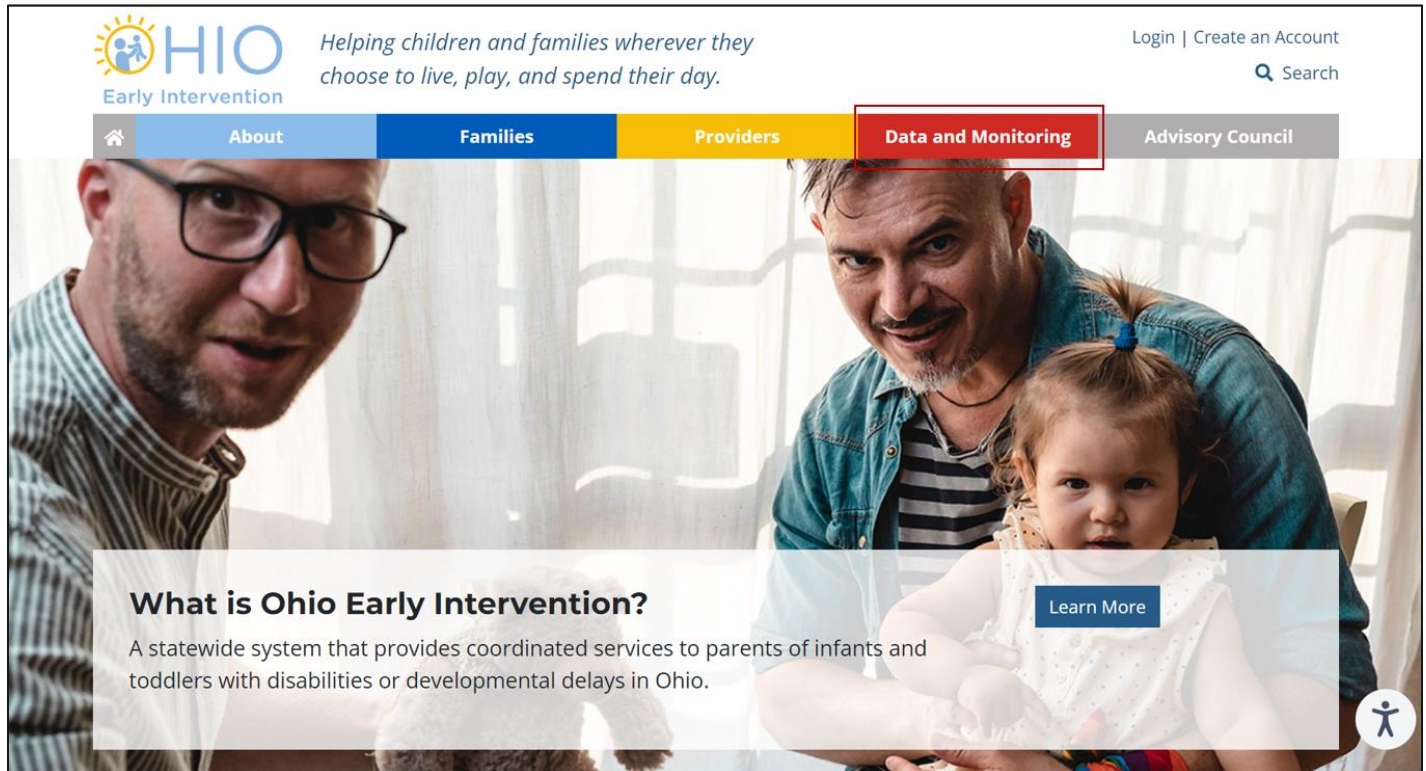
The screenshot displays the Microsoft Excel interface with a PivotTable and the PivotTable Fields task pane. The PivotTable is titled "Count of IFSP_NCR" and is located in the worksheet area. The row labels are "NCR Code" and the values are "Count of IFSP_NCR". The "NCR Code" dropdown menu is open, showing a list of options: "(Select All)", "51", "52", "56", and "(blank)". The "OK" button at the bottom of the dropdown menu is highlighted with a red box. The PivotTable Fields task pane on the right shows the data source "IFSP_NCR" and the fields "IFSP_NCR" and "Count of IFSP_NCR" in the Rows and Values areas, respectively.

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

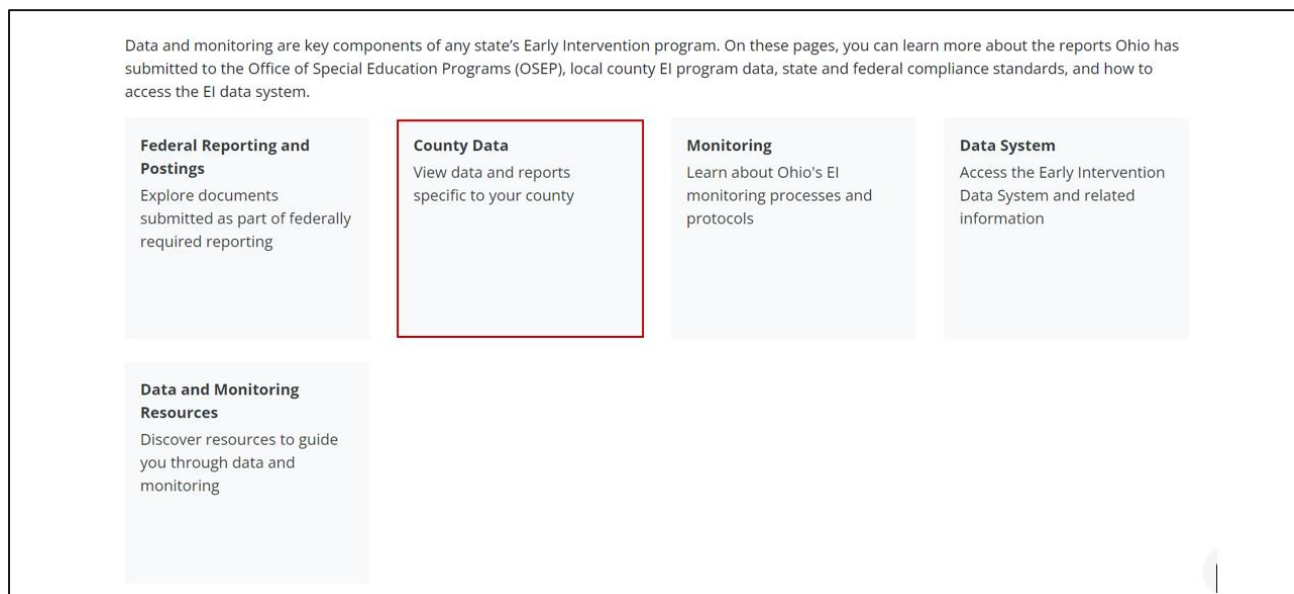
APPENDIX E: LOCATING COUNTY DETERMINATIONS ON OHIO EI WEBSITE

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

Step 2: Click on “Data and Monitoring” Tab




Step 3: Select “County Data”



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.

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[Data and Monitoring](#)
[Advisory Council](#)

County Data



Mahoning County

Annual Report and Determination

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

[Mahoning County SFY22 APR & Determination Report](#)
[Mahoning County SFY21 APR & Determination Report](#)
[Mahoning County SFY20 APR & Determination Report](#)

Family Questionnaire County Data Report

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

[Mahoning County 2022 Family Questionnaire Report](#)
[Mahoning County 2021 Family Questionnaire Report](#)
[Mahoning County 2020 Family Questionnaire Report](#)

[View County List](#)

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

[Return to all county data](#)