IFSP

Updated 2/1/23

How To

- View and understand the IFSP Grid
- Select correct IFSP type
- Select correct IFSP Status
- How to create an Interim/Initial IFSP
- Print a completed IFSP and gather signatures
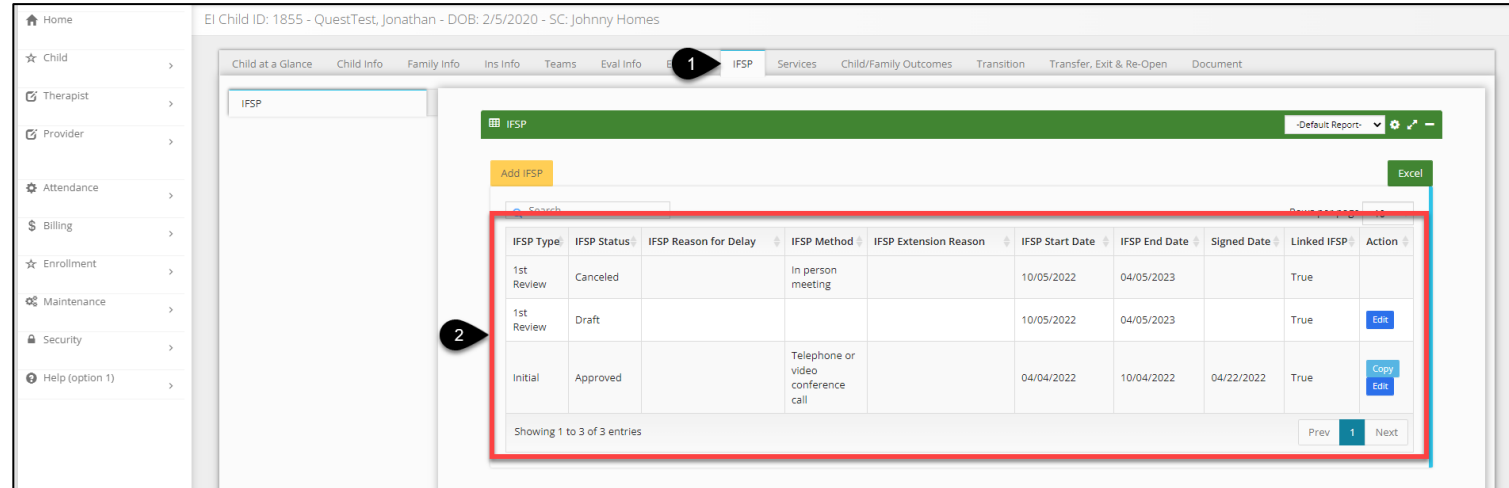- Copy (clone) an existing IFSP for ongoing IFSPs
- Amend an IFSP

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early intervention shaping futures

NYS EI-Hub EARLY INTERVENTION SOLUTION

Solutions that Matter

IFSP
IFSP Grid

How To

View and understand the IFSP grid

Step / Action
1. Upon viewing a child record, **select the IFSP tab**
2. The IFSP Grid will appear in the IFSP panel
   - This grid will display information on all IFSPs related to the child, including the **IFSP Types, Statuses**, Start Dates and End Dates

IFSP
Types

EI-Hub
EARLY INTERVENTION SOLUTION

How To

Select the correct IFSP type

--- Select --- ⌄

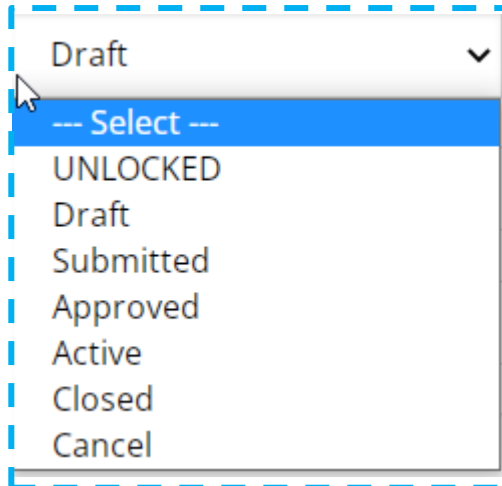| --- Select --- |
| Interim |
| Initial |
| 1st Review |
| 1st Annual |
| 2nd Review |
| 2nd Annual |
| 3rd Review |
| 3rd Annual |
| 4th Review |
| Amendment |
| Extension |

IFSP Types

IFSP Types	Definition
Interim	A temporary plan developed with parental consent for a child - with known developmental delay or disability and who has apparent immediate needs to enable early intervention service delivery - between initial identification of the child's needs & the completion of the Multi-Disciplinary Evaluation.
Initial	The first IFSP (except for Interim IFSP) that a child would have after being deemed eligible for the early intervention program.
1st, 2nd, 3rd, 4th Review	Periodic reviews typically held 6-months after the Initial/Annual IFSP.
1st, 2nd, 3rd Annual	Yearly interval based on the Initial IFSP Start Date.
Amendment	*If an error (data that needs to be corrected that does not require an amendment) is made on **ANY IFSP** you can modify or correct any IFSP without doing an amendment. (with the exception of an IFSP in "draft" status - this would not be needed).* *Amendment is only to add to or remove services, or other information impacting the delivery of services e.g., provider of record for a service changes..* *If changing a service or increasing the number of visits for example, an amendment would be required.* Modification or change to add or remove a service in a current IFSP. An amendment can occur for any change that impacts the provision of services as agreed upon in the IFSP.
Extension	Any extension of an originally authorized IFSP period – no more than two 30-day extensions.

early intervention

How To

Select the correct status

IFSP Status

• The EI-Hub moves each IFSP through various status options, which will all be seen in the IFSP Grid.

IFSP Types	Definition
UNLOCKED *(Formerly known as "Reactivated" in NYEIS)*	Is a status referencing IFSP's that have been closed and "unlocked" to allow edits/corrections. This status can be assigned to an IFSP by select* user roles. *The EIOD may unlock.*
Draft	When a new IFSP is created, it will automatically appear in 'Draft' status. This will remain the status of the IFSP until it is submitted to an EIO/D.
Submitted	An IFSP will automatically move into the 'Submitted' status when electronically submitted by a service coordinator for approval by an EIO/D. **IFSP remains in submitted until review to approve or reject. Status changes automatically after submission.**
Approved	After the EIO/D approves the IFSP and its linked services, the status changes to 'Approved'.
Active	The IFSP will automatically be labeled 'Active' on the start date of the approved IFSP.
Closed	Previously active IFSPs will be labeled 'Closed' when a new IFSP becomes active.
Cancel	Cancel = delete if the IFSP is in a draft status. *The Service Coordinator may initiate.*

* If an IFSP is **rejected** by an EIOD the IFSP Status will automatically return to **Draft** and be sent back to the Service Coordinator.

IFSP

Creating an Interim and/or Initial IFSP

How To

Create an interim and/or Initial IFSP in a child record

Step / Action
1. From the IFSP Grid, select **Add IFSP.**
   - The IFSP Information Panel will automatically display.
2. To create the IFSP record, complete all fields with an asterisk. within the IFSP Information Panel and **select Submit. IFSP Type** may be **selected** in the **drop-down menu. Draft Status defaults as IFSP Status.**
3. Navigate to and edit other sections of the IFSP using the pane on the left.
4. **Once all other panels have been completed and the IFSP is ready** navigate back to the IFSP Information panel. Use the dropdown menu to change the IFSP Status from 'Draft' to 'Submitted' and **select Submit.** The IFSP is now ready t**o** be submitted to the EIO/D for review and approval.

Notes for Service Coordinators

- If you would like to create the IFSP record in preparation for an IFSP meeting, you must fill in the fields with an asterisk in the IFSP Information Panel.

- Once you successfully submit the first panel, the IFSP will be given the Draft status and you may complete the remaining panels in any order.

- Once the draft IFSP has been created, you may also exit the IFSP tab and return to complete the missing information before submitting the IFSP to the assigned EIO/D.

- **Regarding Interim IFSPs, the system logic allows for the Interim IFSP to be created without having information entered in the Eligibility Tab.**

- **If the EIOD needs to reject the IFSP due to data entry error, the IFSP will return to the service coordinator for correction.**

IFSP
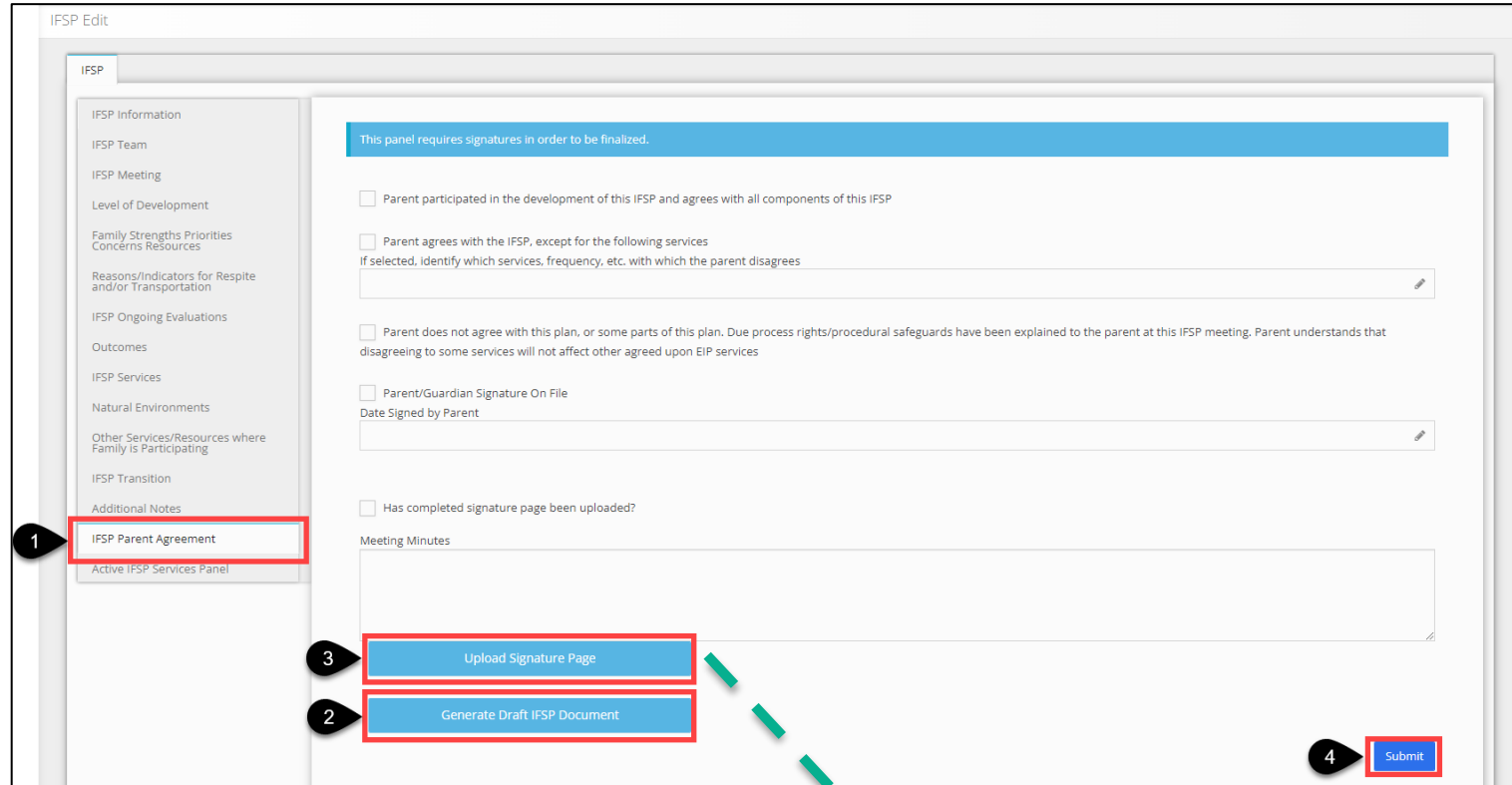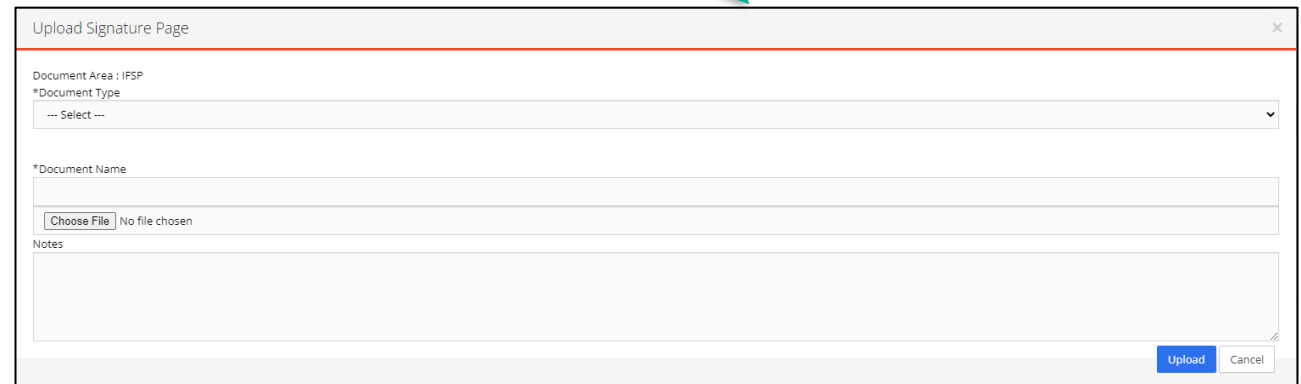## *Printing an IFSP*

How To

Generate an IFSP document from the EI-Hub and record signatures

Once all information for a draft IFSP has been recorded in the EI-Hub, a PDF document can be downloaded with all recorded fields filled-in.

This document can be printed, and parent signatures can be uploaded directly to the IFSP record in the EI-Hub.

Step / Action
1. Navigate to the IFSP Parent Agreement panel
   - The service coordinator (SC) records the parent's agreement (or disagreement) to the IFSP and the date the signature was received in this panel
2. **Select Generate Draft IFSP**
   - The PDF document will automatically download to be viewed and printed from your computer's files
3. Once completed by the parent or guardian, **select Upload Signature Page**
   - In the popup window, choose the scanned attachment from your computer files and **select Upload**
4. **Select Submit**

IFSP
Copying an IFSP

How To

Copy a previous IFSP in a Child Record for ongoing IFSPs

After an Initial IFSP has been created and approved, future IFSPs can be copied from previous records to save repeated entering of information when drafting subsequent IFSPs.

Step / Action

1. A new IFSP record can be created based on a previous IFSP by **selecting Copy** next to the relevant record in the IFSP Grid
2. A new IFSP Duplicate record will be created, retaining services, team members and most other fields from the original IFSP record
3. In the IFSP Information panel, use the dropdown menu to **select IFSP Type** (1st Review, 1st Annual, etc.)
4. To create a copy of an IFSP, **Type Status** defaults to **Draft**. *For any IFSP Duplicate (copy), be sure to double-check the Start Date and End Date and Method the IFSP was conducted to match the needs for the new IFSP.*
5. After entering required fields **select Submit** to save updates to the page and the copy of the IFSP
6. Use the left pane to complete all panels of the IFSP, verifying all information. *If further explanation is needed on how to complete any specific panel of the IFSP please refer to Unit 8 - Case Management*
7. **Once all other panels have been completed and the IFSP is ready** navigate back to the IFSP Information panel. Use the dropdown menu to change the IFSP Status from 'Draft' to 'Submitted' and **select Submit.** The IFSP is now ready t**o** be submitted to the EIO/D for review and approval. IFSP remains in submitted until review to approve or reject. Status changes automatically after submission.

Note

- For any IFSP Duplicate (copy), be sure to double-check the Start Date and End Date and Method the IFSP was conducted to match the needs for the new IFSP.

- Once all panels are completed, be sure to change the IFSP status to 'Submitted' when the IFSP is ready to be submitted to the EIO/D.

Helpful Hint - Prior to copying the IFSP, write down the IFSP active dates to keep original dates to work from on the copy.

Amending or Extending an IFSP

How To

Amend or Extend an approved IFSP in a Child Record

Any changes to an active IFSP must be submitted by selecting the "Copy" button located in the IFSP Grid. This retains the original IFSP record with the child record.

Step / Action

1. **Select Copy** next to the approved IFSP record in the IFSP Grid
2. A new IFSP **Duplicate Record** will be created retaining the services, team members and most other fields from the original IFSP record
3. In the IFSP Information panel, **select Amendment (or Extension)** from the drop-down menu under 'IFSP Type'
4. A second drop-down menu will appear, **select a Reason for the Amendment or enter Extension Reason for Extension**
5. **IFSP Status remains as draft. Select Submit** to save the amended or extended IFSP Record
6. Use the left pane to complete all panels of the IFSP, verifying all information
7. **Once all other panels have been completed** and the IFSP is ready **navigate back to the IFSP Information panel.** Use the dropdown menu to **change the IFSP Status from 'Draft' to "Submitted" and select Submit.** The IFSP has now been submitted to the EIO/D for review and approval.

Note

- Once an Amended or Extended IFSP has been approved by the EIO/D, it will automatically be labelled with the 'Active' status. The original IFSP will automatically be labelled 'Closed' in the IFSP Grid.

- **Check the start and end dates if amending through the cloning feature. The start and end dates will autopopulate based on the original IFSP (likely not accurate for amendments).**

Revision History

Version Number	Release Date	Author	Revision Summary
v.0.1.0	4.22.2022	Evan Thibeau	First Draft Release
v.0.2.0	6.17.2022	Evan Thibeau	First Revisions
v.0.3.0	8.12.2022	Evan Thibeau	Additional information on printing added, other revisions
v.0.4.0	10/18/2022	Matthew	
v.5	02/21/23	Matthew	Updated comments