

Over the past several weeks/months, we have been talking about ways to make the intake process a bit more streamlined, especially during this crisis, when staff are handling huge caseloads. Based on our conversations and provider feedback, below is some clarification that will be in place until further notice:

Entry COS A

In order to alleviate writing repetitive information, the **completion of the COS A at entry is optional**. Those who choose to record the child's functional information directly on the COS B, please remember that there is still the need to collect rich comprehensive information in order to choose the most accurate summary statement.

The ECOMAP

Drawing the Ecomap is optional. Staff can choose to **either draw the Ecomap complete with lines and relationships OR capture the basic information in a text only format**.

This means staff do not need to ask questions such as "how often do you talk with ___?" or "how would you describe your relationship with ___?"

The Family Intake form in Welligent includes questions about concerns, priorities and resources. If staff are using their own electronic or paper form, they can capture information about the family's resources in text format, right on the Ecomap page.

In all circumstances, staff **MUST minimally include the people who are regularly with this child, what the family has as resources (both in individuals, organizations, services, groups, etc.), who the family relies on for help, and what resources might they be interested in learning more about.**

The Routines Based Interview (RBI)

While we continue to believe that best practice involves the Routines Based Interview be done with fidelity, we also recognize that this can take a good chunk of time. Therefore, **if staff prefer, they can use the Routines and Activities page or the MEISER with embedded questions in place of the full RBI**. When possible, both during the development of the initial IFSP and thereafter, staff should strongly consider conducting **a focused RBI when there is the need to gain a better understanding of a child's participation, engagement and independence within a specific routine or activity.**

Welligent 2022 has been updated to no longer require the “date of the RBI” but rather **“Routines Based Assessment Method” with a drop down that includes “Daily Activities and Routines”, “MEISR”, or “Routines Based Interview” and the corresponding date of completion.**

Any staff not yet using the Intake forms in Welligent should record the same information as it is defined in Welligent.

We will continue to train staff to conduct a full RBI, while making them aware of the options noted above.

Hearing and Vision Screening

The Hearing and Vision Screening forms MUST be completed as part of the initial evaluation/assessment process. It is not necessary to conduct these screenings annually.

Evaluation and Assessment SRF

This form was replaced in Welligent with the comprehensive multidisciplinary evaluation session note.

For staff continuing to use “paper” when completing the **Evaluation and Assessment SRF**, **staff do not need to write a summary under the 3 outcome areas IF this information has been documented in the COS B.** If this information has been documented in the IFSP and reviewed with the family, staff can write “See Child Outcome Summary Form B” or “See COS B”.

For example:

- 1) Demonstrate Positive Social Emotional Skills See COS B**
- 2) Acquire and Use Knowledge and Skills See COS B**
- 3) Use Appropriate Action to Meet Needs See COS B**

Six Month IFSP Review

The purpose of this IFSP meeting is to **review Outcomes and Services.** It can also serve as a marker to update the child’s ongoing assessment tool. **It is not necessary to re-write any part of the IFSP.** New outcomes and services should be written/added to the

IFSP currently in place. In Welligent, outcomes and services should be reviewed and updated as needed.

Annual IFSP Review

The purpose of the **Annual Review is to review the IFSP including Outcomes and Services**. It can also serve as a marker to update the child's ongoing assessment tool.

It is not necessary to re-write any part of the IFSP. New outcomes and services should be written/added to the IFSP currently in place. In Welligent, outcomes and services should be reviewed. Services should be copied forward, in order to add end dates and/or add new or continuing services. Outcomes are reviewed and updated as needed.

Present levels of development are summarized annually. This can be done on an SRF or by using the **Annual IFSP form**. Some may want to use the Annual IFSP form in order to organize updates, update present levels of development based on information gathered in ongoing assessments, etc.