

Transitioning to New EI Forms & Procedures

The new Early Intervention (EI) rules and forms are anticipated to go into effect on July 4, 2024. In order to ensure that components align with changes in rule, programs should begin using the new forms beginning July 4, 2024, with a few exceptions. This document is intended to provide a brief overview of key changes and how programs should plan to transition to the new forms and adjust procedures to reflect the new rules. Throughout this document the rules and forms active prior to July 4, 2024, are referred to as the “previous” forms/rules and the rules and forms active as of July 4, 2024, are referred to as the “new” forms/rules.

Eligibility and Redetermination

- Children who are referred to an EI program on or after July 4, 2024, will have their eligibility documented on form EI-03 (Prior Written Notice of Eligibility Determination), instead of the IFSP, even if the child is not eligible. Form EI-09 will no longer be used.
- When an evaluation is conducted, Hearing and Vision Checklists must also be completed and considered as part of determining eligibility.
- Redetermination of eligibility will no longer be required for children found eligible before July 4 for whom redetermination is due after July 4. For these children, the previous EI-12 (Documentation of Diagnosed Condition) or Section 3B of the previous IFSP documenting eligibility via ICO can continue to be used and the child will be eligible until age three. Continue to follow the previous rule requirements for any child whose redetermination is due prior to July 4.
- The EISC will provide form EI-03 to the child's parent within five calendar days of eligibility determination.

Child Assessment

- The new Hearing and Vision Checklists will be completed as part of the initial and annual assessment process for all children. If the checklists were completed as part of the evaluation, then they do not need to be completed again as part of the initial assessment.

IFSP

- For children who have a previous IFSP, programs may continue to use the existing form until their annual IFSP. As always, programs can hold a child’s annual IFSP at any time within 90 days of the annual IFSP due date.
- When using the previous IFSP during periodic IFSP reviews held after July 4, 2024, do not use the previous signature page. Instead, replace the previous signature page with the signature page from the new IFSP. The new signature page needs to be used to ensure that the requirements for prior written notice (PWN) are included in the IFSP. Prior to July 4, DCY will provide a PDF of only the signature page on the Ohio EI website for this purpose.

Prior Written Notice

- The new IFSP form contains the PWN for beginning or changing services, thus a separate PWN form (EI-11) will not be required when services are added or changed as part of an IFSP meeting.
- Form EI-11 (Prior Written Notice of Proposed Change to Services) will not be used to provide PWN of planned IFSP services. It will only be used by a service provider who proposes to end a service before an IFSP review can be held.

Consent for Release or Exchange of Information

- Any form EI-06 (Consent for Release or Exchange of Information) that was completed prior to July 4, 2024, for families already in the EI system will remain valid until there is a need to update or change the consent for release. Check the end date marked on the previous EI-06 to determine when a new EI-06 is needed. Starting July 4, use the new version of the EI-06 for new children and/or when a parent provides new or different consent for release of information.

Transition

- There will no longer be an “opt out” for providing specific personally identifiable information (PII) to local school districts of residence (as previously documented on the top half of the previous form EI-07). The new form EI-07 is only for Consent for Transition Planning Conference (TPC) and will be used beginning July 4, 2024. Requests made by parents prior to July 4 to “opt out” of sharing PII with the school district will be honored and the data system will continue to show that entry for that child. However, the option to NOT NOTIFY the school district in EIDS will no longer be operational beginning July 4, 2024, and cannot be edited going forward, thus all opt-outs must be entered prior to changes taking effect.
- The new EI-07 includes a section for the parent(s) to consent to the invitation of the school district representative to the TPC. This reflects consent for participation but does not replace the need for form EI-06 to be completed prior to sharing documents with the LEA, such as the child’s evaluation or IFSP.

Professional Referral Follow-up

- Form EI-14 (Professional Referral Follow-up) has been revised and will be used for all children for whom referral follow-up was not made prior to July 4.

New Referrals with an Initial IFSP Process that Spans Old and New Forms

Some children who are referred to EI prior to July 4, 2024, will have components of the 45-Day process completed before and after July 4. It is recommended for ease of transition that form EI-03 and the new IFSP form be completed for any child whose evaluation and assessment information has not yet been recorded on the previous IFSP. If the child and family information and eligibility/assessment information are already recorded on the previous IFSP, but the initial IFSP meeting has not been held to develop outcomes, the EI team may:

- Transfer the demographics, eligibility, and assessment information to the new forms
OR
- Use the previous IFSP until the child's annual IFSP.

System of Payment Forms

Rule 5123-10-03 will be amended to increase the number of units of Early Intervention services available to parents at no cost from 55 to 100 per year, starting July 4, 2024. Any family with an active IFSP on July 4, 2024, can immediately receive up to 100 units at no cost for their current IFSP year (i.e., the time between their most recent occurring initial or annual IFSP and the due date of their next annual IFSP or third birthday). Any units that have been used since their most recent initial/annual IFSP, prior to July 4, will be subtracted from the 100 total units. For example, if a family's annual IFSP was conducted on December 10, 2023, and they have already received 40 units between December 10 and July 4, 2024, they can receive up to 60 additional units at no cost until December 9, 2024.

If a family already received over 55 units during their current IFSP by July 4, the family would then get up to 45 units at no cost before the end of their IFSP year. For example, if they received 75 units prior to July 4, they would have received the first 55 at no cost, the parents then paid for the next 20 units (prior to July 4), and now between July 4 and their annual IFSP/third birthday, they could receive an additional 45 units at no cost.

Changes in EIDS

- Eligibility was edited so all children are eligible until age three – this is applicable for all children served in EI prior to July 4, 2024, and going forward.
- The diagnosis on the list dropdown options were edited to reflect the changes in Appendix C of 5123-10-02. All previously entered diagnoses on the list information remain valid eligibility reasons.
- The **Profession/Discipline** dropdown list was edited on the evaluation and assessment pages to reflect the changes in Appendix B of 5123-10-02.
- The **COS statement** verbiage was edited on the IFSP and Exit pages to reflect the changes on the new EI-04. All existing data was updated with this verbiage, as well.
- The **Transition contact info shared with the LEA** field on the IFSP page was edited to select “Yes” in all records. Existing records reflect the option selected prior to July 4 and responses of “No” are able to be edited to “Yes.”
- The **Funding Source** dropdown on the IFSP page was edited to reflect the funding sources included in 5123-10-03.
- The **Method** field on the IFSP page was removed.
- The verbiage on **Transition Steps and Services** page referencing the specific section on the IFSP was edited to reflect the verbiage on the new EI-04. The character limit of this field was also increased.
- The **Exit Reason** dropdown options on the Exit page were edited to match the applicable exit reasons on EI-10.