



## Data Clean Up and Administrative Change Review Tip Sheet

OSEP has recently approved the use of an Administrative Change Review. This table should help service coordinators know how and when to use this type of change review to clean-up planned services. Please see the excerpt from the BabyNet Policy and Procedure manual for information on when an administrative change review can be used. **Before making any changes to planned services, remember to always check “previous IFSPs” to make sure the services have been captured on a previous plan.**

Clean-up Activity	Unfinalized Plan	Finalized Plan
Services on the Planned Services screen should be current. This means the start and end date range include today’s date.	<ul style="list-style-type: none"> <li>• If there is NO service log attached to the service, simply click “edit” or “delete” and correct the line of service.</li> <li>• If there is a service log attached to the service and you can’t edit/delete:               <ul style="list-style-type: none"> <li>○ Finalize the plan</li> <li>○ Prepopulate a change review</li> <li>○ Make corrections as needed</li> <li>○ Document the need for an <i>administrative change review</i> and note changes on IFSP screen section 8 (IFSP Team Meeting Notes)</li> <li>○ Enter a service log explaining the need for an administrative change review.</li> <li>○ Notify parents of the changes.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Prepopulate a change review.</li> <li>• Edit or delete expired or incorrect planned services.</li> <li>• Document the need for an administrative change review and note changes on IFSP screen section 8 (IFSP Team Meeting Notes) and enter a service log explaining the need for an <i>administrative change review</i>.</li> <li>• Notify parents of the changes.</li> </ul>
Any services with BRIDGES agency/provider enrollment pending should be corrected.	<ul style="list-style-type: none"> <li>• If the actual provider is now in BRIDGES:               <ul style="list-style-type: none"> <li>○ Edit the service</li> <li>○ Select the appropriate agency and provider</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• If the actual provider is now in BRIDGES:               <ul style="list-style-type: none"> <li>○ Prepopulate a change review.</li> <li>○ Edit the service and select the appropriate agency and provider.</li> <li>○ Document the need for an administrative change review and note changes on IFSP screen section 8 (IFSP Team Meeting Notes) and enter a service log explaining the need for an <i>administrative change review</i>.</li> <li>○ Notify parents of the changes.</li> </ul> </li> </ul>

**BABYNET POLICIES AND PROCEDURES, eff. 01jul14**  
**Part I: Mission and Principles, Definitions, and Services to Families from Referral to Transition**

**20. Change Reviews of the IFSP**

- a. Change Reviews are categorized as ‘Administrative’ and ‘Formal’ Change reviews. The documentation for either type remains the same, i.e., written notice and service logs in BRIDGES, as well as updates to appropriate BRIDGES screens as indicated by the needed change. The guidance below indicates when a **meeting** of the IFSP team is needed.
- b. Administrative Change Review:
  - i. Administrative Change Reviews apply only the following types of changes:
    - a) Change in service coordinator and/or service coordination agency;
    - b) Change in EIS Provider and/or agency
    - c) Change in any information **excluding** the payor source, outcome, planned services, or service frequency, intensity, duration, method, or location (see “Formal Change Review” below).
  - ii. Conditions of an Administrative Change Review:
    - a) Does **not** require a meeting
    - b) Does **not** require notice to the family **prior** to the change,
    - c) **Does** require written notification to the family and communication with other team members that a team member and/or other information as listed above has changed. The family must receive this information in writing; the BRIDGES Communication Log may be used for other members of the IFSP team.
- c. Formal Change Review
  - i. Formal Change Reviews apply to the following types of changes
    - a) payor source,
    - b) outcome,
    - c) planned services, or
    - d) service frequency, intensity, duration, method, or location
  - ii. Conditions of a Formal Change Review:
    - a) **Does** require meeting (face-to-face with family and same options for participation by other IFSP team members).
    - b) **Does** require written prior notice to family and other members of the IFSP team that any of the following content of the IFSP needs to be changed.