Determining Eligibility: Step by Step Process

Step 1: Determine if the child may have a diagnosed condition that could result in a delay

The EISC should review the referral information and discuss any potential diagnoses with the parent.

A. Was the child previously determined eligible and are they still eligible (e.g., eligible via tool or diagnosed condition on the list (Appendix C) from another county or during previous participation in EI) as listed in EIDS under Eligibility or on a physical IFSP? If so, child is still eligible and new eligibility determination is not needed.
   1. If yes, proceed to **Step 6**
   2. If child was not previously determined eligible or is no longer eligible, proceed to **Step 1B**
B. Is there appropriate documentation of a diagnosis on the list already in EIDS (under Referrals, Contact Log, or Managed Documents)?
   1. Did the referral come from ODH (*State Health Department*) for a diagnosis of **Elevated Blood Lead Levels (EBLL)** or **Neonatal Abstinence Syndrome (NAS),** or **Hearing Loss**? If so, the referral in EIDS is documentation of a diagnosed condition on the list.
      • If yes, proceed to **Step 6**
   2. Did the referral come from a *Hospital Based Child Find* program for a confirmed diagnosis on the list? If a diagnosis on the list is confirmed in EIDS on the slider in the Contact Log, the referral in EIDS is documentation of a diagnosed condition on the list.
      • If yes, proceed to **Step 6**
   3. Is there documentation of a diagnosed condition on the list in EIDS under Managed Documents, such as a discharge summary or medical record?
      • If yes, proceed to **Step 6**
      • If there is no documentation of a diagnosed condition on the list in EIDS, proceed to **Step 1C**
C. Did the referral source or parent indicate that the child has a diagnosed condition (on the list or not on the list) or is there information referencing a diagnosis in EIDS (e.g., Managed Documents, Referrals, or Contact Log)?
   1. If yes, proceed to **Step 2** to obtain documentation
   2. If no, proceed to **Step 4** to coordinate evaluation

Step 2: Request documentation of the diagnosed condition

The EISC should confirm whether the diagnosed condition is on the list in Appendix C.

A. If the diagnosed condition is on the list:
   1. Ask the parent if they have documentation of the diagnosed condition (e.g., discharge summary)
      - If yes and the documentation is obtained, proceed to **Step 6**
      - If no, obtain "Consent for Release of Records/Exchange of Information" (EI-06) and/or hospital release of information from parent and request documentation from the qualified medical professional and proceed to **Step 3**
B. If the diagnosed condition is **NOT** on the list:
   1. Obtain "Consent for Release of Records/Exchange of Information" (EI-06) from the parent and send the EI-12 to the qualified medical professional for completion (or have parent send/take EI-12 to medical professional, if convenient) and proceed to **Step 3**
C. If the EISC isn't sure if a diagnosis falls under a condition in Appendix C, they can reach out to their program consultant for clarification

Step 3: Confirm diagnosed condition and document receipt

The EISC should follow up with the medical professional to obtain documentation of the diagnosis early enough in the timeline to complete all components within 45 days from referral. The eligibility date is the date documentation of the diagnosed condition was obtained.

A. If the EISC has received documentation of the diagnosed condition:
   1. Confirm that documentation is complete
      - Documentation of a diagnosis on the list includes the diagnosis and medical professional's signature/authorization
      - EI-12 includes the specific diagnosis, at least one box checked for potential area of delay, & medical professional information, including signature
   2. Document the date received on 3A of the IFSP and proceed to **Step 6**
B. If the EISC has **NOT** received acceptable documentation in a timely manner:
   1. Document all attempts to obtain documentation in case notes and proceed to **Step 4** to coordinate an evaluation (note that any documentation received after this point should still be entered in EIDS and recorded in the child's record)

Step 4: Complete evaluation in all five domains using the Bayley or BDI using qualified personnel

If conducting an evaluation virtually due to health restrictions, follow the protocol provided in Completing EI Eligibility Process during State of Emergency.

A. If the tool shows a delay of 1.5 SD or more in any area, the evaluators need to complete 3B of the IFSP, documenting the areas of delay that make the child eligible
    1. If the tool shows a delay, proceed to **Step 6**
    2. If the tool does NOT show a delay of 1.5 SD or more in any area, proceed to **Step 5**

Step 5: Determine potential eligibility using Informed Clinical Opinion (ICO)

If the evaluation tool did not indicate a delay of at least 1.5 SD in at least one of the five domains, the evaluation team may determine eligibility using informed clinical opinion (ICO) based on their professional expertise and considering additional information such as observation, parent report, and additional sources of information.

A. If the child is determined eligible via ICO, the evaluators need to complete 3B of the IFSP, documenting how the child was determined eligible
    1. If eligible via ICO, proceed to **Step 6**
B. If the child is **NOT** eligible via ICO
    1. Explain eligibility results to the family
    2. Determine current family needs and make any appropriate referrals
    3. Provide PWN of Determination of Ineligibility (EI-09), as per rule, and thoroughly document all activities and conversations in detail
    4. Provide PWN of Exiting (EI-10) and enter the exit information in EIDS within one business day of the exit

Step 6: After determining that a child is <u>eligible</u>, explain eligibility results to parents and move on to the child and family assessment process

A. Explain eligibility results and how long the child is eligible for EI in Ohio:

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Type of Eligibility	*How long child is eligible
Diagnosed condition on the list	Until age 3
Developmental delay via tool	Until age 3
Developmental delay via ICO	Redetermined annually
Diagnosed condition not on list (EI-12)	Redetermined annually

*Eligibility applies statewide for the time periods listed in the table above even if a child transfers counties.

B. Complete the assessment process:
1. Provide PWN & obtain consent on EI-02 for child assessment
2. Provide PWN & obtain consent on EI-03 for the FDA
3. Complete the child assessment and FDA (if consent is obtained)

Additional Considerations

When is screening appropriate?
- Screening should be limited to children for whom there are not developmental concerns or who do not have a diagnosed condition likely to result in a delay
- If a screening is conducted, the ASQ & ASQ:SE must both be used
- The parent always has the right to request an evaluation (as explained in parent rights)

When is EI-09 PWN Determination of Ineligibility used?
- EI-09 is only used when a child is referred for a developmental concern and the evaluation determines the child is not eligible for EI

References and Resources

1. IFSP Guidance Document: https://ohioearlyintervention.org/storage/ocali-ims-sites/ocali-ims-oei/documents/IFSPGuidanceDocument07012019.pdf
2. EI Program eligibility and services Rule 5123-10-02: https://dodd.ohio.gov/wps/portal/gov/dodd/forms-and-rules/rules-in-effect/5123-10-02
3. Informed Clinical Opinion (ICO) guidance document: https://ectacenter.org/~pdfs/pubs/nnotes10.pdf
4. Verification Standards: https://ohioearlyintervention.org/monitoring
5. EIDS Data Entry Guide: https://ohioearlyintervention.org/data-system

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