

EI Services Report Instructions and Tips

This report includes all services listed on IFSPs in the user-specified timeframe, along with associated information about the services. Each row in the report is a unique service and outcome on a unique IFSP for a unique child.

Run and save the report

Navigate to **EI Services** on the **Reports** tab. Select the county and enter the desired date range. Then press “Get Report.”

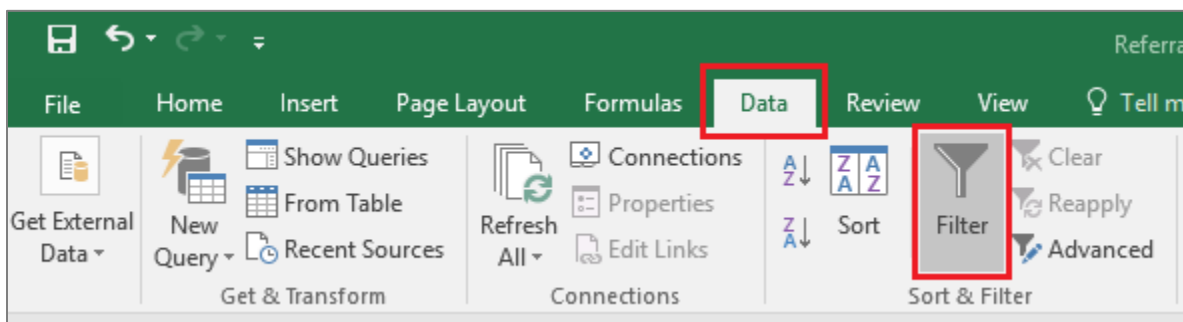
*County:	BEIS Test County ▾
*IFSP Date From:	10 / 01 / 2018
*IFSP Date To:	12 / 31 / 2018
*Report Format:	EXCEL

The default file format is CSV. In order to be able to utilize all functionality, save the file as an Excel file. To do so, click “Save As” and select the desired location. Type in the file name and select “Excel Workbook” in the “Save as type” field. Then press “Save.”

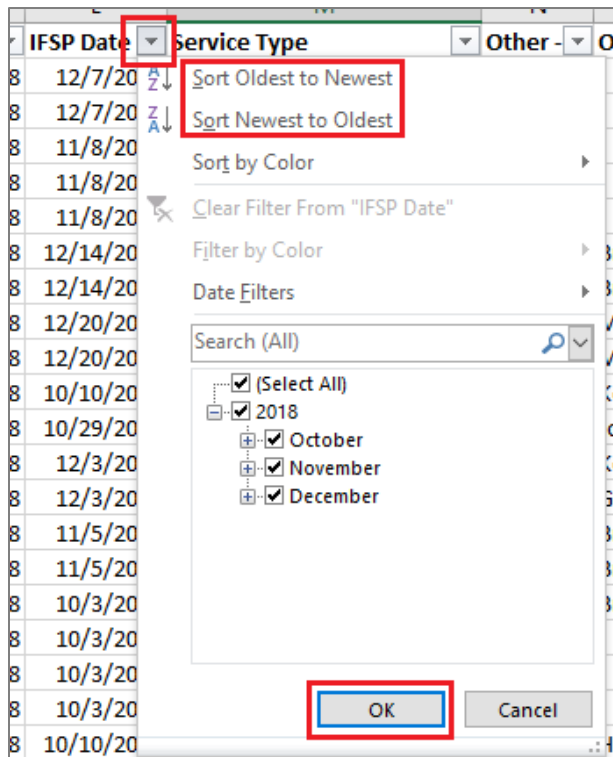
File name:	EI Services on IFSPs 10.1.18 to 12.31.18
Save as type:	Excel Workbook

Sorting and Filtering

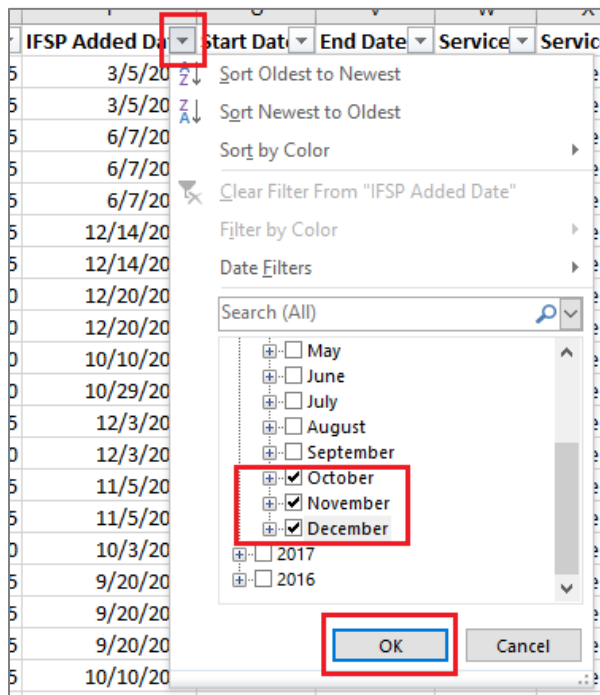
To utilize filters, first highlight the top row of the file that includes the field names. Then, navigate to the “Data” tab at the top of the file, then to the “Sort & Filter Section” and select “Filter.”



Click on the filter button at the top of any column to sort or filter data as desired. For example, to sort the file so that data are in order based on when IFSPs were completed, navigate to the “IFSP Date” column, click on the filter button, and select “Sort Oldest to Newest” or “Sort Newest to Oldest,” then press “OK.” To arrange the file in order of IFSP date by specific child, sort by ETID after sorting by IFSP date.



Data can also be filtered to only display selected information. For example, this report includes all services *listed* on IFSPs in the specified timeframe, regardless of when the service was first added to an IFSP. To select only services *added* within a specified timeframe, navigate to the “IFSP Added” field and click on the filter button. Select the desired dates, then click “OK.”

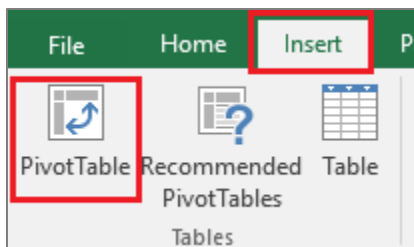


To utilize only a subset of the data, use filters to select the desired data, then copy and paste the data into a different tab. By doing so, the original data remain intact. Alternatively, use filters to select unneeded data, delete the rows, then remove the filter to view desired data.

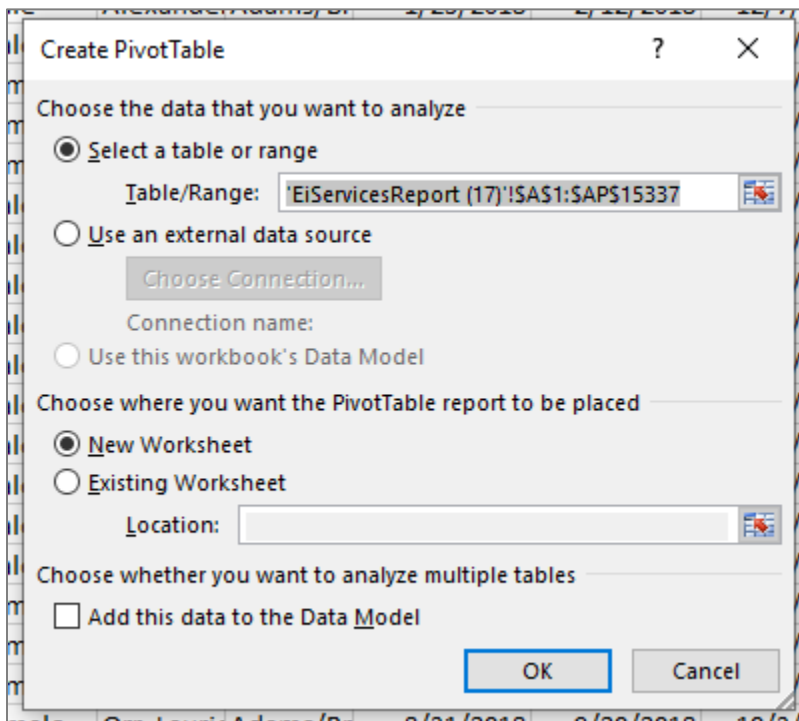
Note: For several years prior to 7/1/19, each outcome was entered separately into EIDS, so a service may be listed more than one time on the same IFSP, and this additional cleaning may need to be done to obtain the desired subset of data.

Pivot Tables

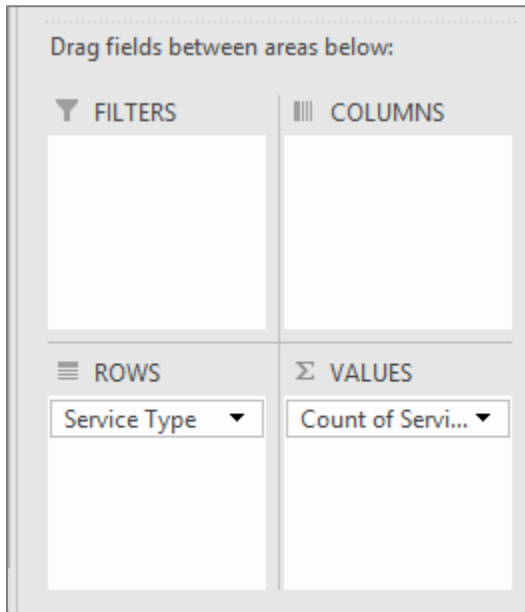
Pivot tables are a useful tool to quickly see a breakdown of data or to utilize filters without deleting information out of the file. Navigate to the “Insert” tab and then select “Pivot Table” in the “Tables” section.



A box will pop up with options for creating the pivot table. The default table range should cover all the data in the file. Select whether the table is placed in a new worksheet or the current worksheet, then press “OK.”



Drag fields of interest to the appropriate box below the pivot table fields. For example, to determine many children had each service type listed on IFSPs in the specified timeframe, drag the “Service Type” field to the “ROWS” and “VALUES” boxes.



The table then displays the number of children who had each service type listed on an IFSP in the specified timeframe.

Note: Remember this report contains all services listed on IFSPs that occurred in the specified timeframe. Use the “IFSP Added Date” instead of “IFSP Date” in the pivot table to determine number of children with each service type added during the specified timeframe. Additionally, keep in mind that service types could be duplicated on IFSPs due to addressing multiple outcomes, so be sure to remove any duplicates necessary to obtain the desired counts.

Additional Calculations

Service Due Date

To calculate the date services are due to start (within 30 days of being added to the IFSP), navigate to the “IFSP Added Date column,” insert a column to the right, and type “Service Due Date” as the column header. In the second row of the column (U2), type the following formula: `=T2+30`, where T2 refers to the “IFSP Added Date,” 30 refers to the number of days, and U2 refers to the calculated “Service Due Date.” Adjust the formula as necessary to ensure it references the “IFSP Added Date” column.

	T	U
	IFSP Added Da	Service Due Date
5	3/5/2018	=T2+30

Double click in the bottom right corner of U2 to autofill the formula through the entire column. Copy the entire column and paste as values (leaving the formulas in the file can create issues if subsequently sorting, filtering, etc.). Use sorting, filtering, or pivot tables to obtain the desired data regarding TRS compliance or other information related to service due dates.

Calculate Number of Days from IFSP to Initial Service Delivery

Calculating how long it took for services to begin can be useful in monitoring Timely Receipt of Services (TRS) compliance. To do so, insert a column and add a column header such as “Start Date Minus IFSP Added Date.” In the second row of the column, type the formula =IF(V2="", "", V2-T2), where V2 refers to “Service Start Date” and T2 refers to “IFSP Added Date.” This formula accounts for services for which a start date has not been added in EIDS. Adjust the formula as necessary to ensure it references the correct columns.

	T	U	V	W
	IFSP Added Date	Service Due Date	Start Date	Start Date Minus IFSP Added Date
5	3/5/2018	4/4/2018	3/5/2018	=IF(V2="", "", V2-T2)

Utilize the newly created column to determine whether the service was delivered in a timely manner:

- If the start date was blank, the service was either marked as “Never Delivered” or a date was never added.
 - If a noncompliance reason is listed, the service was marked as “Never Delivered.” Look at the noncompliance reason to determine whether the service was compliant
 - If a noncompliance reason is not listed, the service date is truly missing
- If the number of days is 30 or less, the service is compliant
- If the number of days is more than 30, look at the noncompliance reason to determine whether the service was compliant

Alternatively, the **Start Date** can be compared to the **Service Due Date** to determine whether the service started within the required 30 days. If the **Start Date** is on or before the **Service Due Date**, the service was delivered in a timely manner.

Note: For several years prior to 7/1/19, each outcome was entered separately into EIDS, thus, if new outcomes were added for a service that was on a previous IFSP, these services may be included within the selected “IFSP Added Date” timeframe, but may not be subject to TRS.

Note: If an IFSP review is completed prior to all services from the previous IFSP starting, any service that has not yet started must be marked as “Never Delivered” in EIDS before the IFSP review can be added, and then must be added again to the IFSP review. Keep this in mind if the compliance status of any of the services was “Never Delivered.”

Need Additional Resources or Assistance?

See the more comprehensive “Using Data in Excel” document for instructions on how to perform many other functions in Excel. If you have specific questions regarding how to obtain needed information from this or any report, email eids@dodd.ohio.gov at any time.