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M E M O

TO: Early Intervention Program Directors and Agency Directors
FR: Katharine E. Thomas, Assistant Director for Policy and Planning
RE: Policy and Administrative Updates: Eligibility Tools
DATE: June 24, 2003

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This policy directive is intended to provide guidance around new early intervention eligibility evaluation/assessment requirements, to be implemented by the Department of Public Health based on the recommendations of the Eligibility Tools Task Group and voted on by the Interagency Coordinating Committee on March 21, 2002.

The Eligibility Tools Task Group researched numerous tools and, in 2002, recommended the following for use in establishing eligibility for early intervention in Massachusetts:

- 1) Battelle Developmental Inventory (BDI),
- 2) Early Intervention Developmental Profile (EIDP/ the "Michigan"), and
- 3) Hawaii Early Learning Profile (HELP)

At the program Directors' Policy Training in October 2002, and in a subsequent memo dated 12/18/02, DPH informed the EI community of its intention to accept the Task Force recommendation and to initiate use of the recommended tools with a yearlong timeline for implementation.

In the spring of 2003, DPH convened a short-term advisory group to inform the implementation plan. During meetings of this group and in subsequent information-gathering activities, the following points also informed this plan;

- 1) The BDI is currently being updated and a new version will be available in 2004,

- 2) The creators of the HELP specifically discourage its use for eligibility evaluation, although its use is encouraged for intervention planning, and
- 3) The vast majority of Massachusetts's Early intervention practitioners have familiarity and comfort with the Michigan as an eligibility/assessment tool, though many have not been trained on scoring it properly.

In light of this information, the Department will require the following: **After January 1, 2004, all Massachusetts programs will be required to use ONLY the Early Intervention Developmental Profile (“the Michigan”) for eligibility determination. Moreover, the EIDP will need to be scored for an age equivalent on the profile graph.**

As this plan is implemented over the next three to five years, the following factors will remain constant:

- 1) All children who have entered early intervention in Massachusetts under the current criteria, prior to July 1, 2003, will remain eligible through age 3 or until determined to not meet eligibility criteria using the EIDP.
- 2) DPH requires that eligibility be re-determined annually. Ongoing assessments and IFSP updates are encouraged based on the individual needs of the child and family, and should be documented through progress notes and IFSP Review Pages.
- 3) **Please note that the use of eligibility evaluation tools correlates closely with the eligibility categories as articulated in the Early Intervention Operational Standards.** While all children must have an initial evaluation using an approved tool, **only** children eligible under the “Established Delay” category must meet delay criteria as described in the Early Intervention Operational Standards.

For children eligible under “Established Condition” or “At Risk for Developmental Delays or Disorders”, the EIDP Profile Graph must be completed, but does not need to show a developmental delay. It should be utilized for planning of intervention and determining a child's strengths and needs rather than simply for establishing eligibility.

- 4) **Clinical Judgement**: A multidisciplinary team performing an eligibility evaluation for early intervention should ALWAYS be utilizing informed clinical opinion, a required component in the administration and interpretation of each of the tools recommended by the Department. However, when a child does not qualify under Established Condition, Established Delay, or Risk, but still shows questionable quality of developmental skills or functioning, a multidisciplinary team may provide that child with services under the eligibility category of “Clinical Judgement” for six months. Per the Operational Standards, a child initially eligible under “clinical judgement” ALONE must then have an eligibility evaluation to determine further eligibility for services which may be based on a diagnosis, developmental delay, or risk factors after the initial six months.

Eligibility Evaluation: Three to Five Year Plan for implementation

Year 1 (7/1/03 to 6/30/04). Programs currently using the Mullen Scales of Early Learning to determine early intervention eligibility must discontinue its use by **January 1, 2004**. . At this time, all programs should be using the EIDP (“Michigan”) as the eligibility tool. Proper use of the EIDP requires calculation of an age equivalent score (not a range), to be submitted to DPH on the Early Intervention Information System (EIIS). In order to calculate the score appropriately, the “Profile Graph” (included) **must** be used, as of January 1, 2004.

Many programs have already begun to explore the transition from the Mullen to the Michigan, including use of materials. Regional Specialists will encourage networking among programs to support a smooth and consistent transition.

Training in the administration and scoring of the EIDP planned for Year 1 will be mandatory for all Program Directors during the annual Program Directors’ Training in Fall of 03. In addition, resources will be available through the DPH and the EITC to provide supplemental training and technical assistance to programs regarding the EIDP.

Please Note:

Delay must be established in one or more areas of development. It is expected that professional judgement of staff would inhibit a child being found eligible for early intervention if, for example, the child had normal development but was delayed in toilet-training (self-care section of EIDP), which is only one area of the Self-Care section of the EIDP and is not indicative of the a delay in the entire Self-Care domain.

During Year 1, program staff are encouraged to continue the use of supplemental **assessment** tools, including discipline specific tools. Programs are also encouraged to initiate use of the Hawaii Early Learning Profile (HELP), on a voluntary basis, for intervention planning but not for eligibility determination.

Year 2 (7/1/04 to 6/30/05): Programs will continue to use the EIDP to determine an age range for eligibility. Programs may also begin to utilize the BDI-2, due out in 2004, on a voluntary basis. Scoring for the BDI-2 must be based on age range, following the BDI-2 instructions.

During Year 2, it is recommended that the Standards Committee of the Interagency Coordinating Council undertake review of the eligibility criteria as described in the Massachusetts Early Intervention Operational Standards. This review should be focused on the following:

- Comparison of data in Year 1 and Year 2 regarding numbers of children eligible, and presenting age ranges and categories of eligibility
- Review of Clinical judgement category, especially with regard to whether child initially seen in this category then become eligible under another category
- Review of levels of developmental delay utilized to determine eligibility for early intervention
- Update and revise Early Intervention Operational Standards as necessary.

Year 3 (7/1/05 to 6/30/06).: Assuming fiscal viability, the Department will offer training in the BDI through Riverside Publishing, and will also purchase BDI kits for program use. The Department will survey providers regarding the use of the EIDP and the BDI, in order to gather information about consistency of administration, clarity of scoring, and establishment of age range for eligibility under Developmental Delay.

Year 4 (7/1/06 to 6/30/07). Request Interagency Coordinating Committee to convene new Task Force on Eligibility Tools to review plan, update as necessary, and recommend additional tools based on DPH criteria.

Please feel free to contact me or your Regional Specialist about the information contained in this memo. Thank you very much for your ongoing contributions to a quality Early Intervention system in Massachusetts.