Associated Visit Feature

This document will give an overview of the Service Visit drop down types located in the “Add Visit” section of BTOTS and associated visits that will need to be entered throughout BTOTS. There will different service visit types depending on if the child is under IFSP or not. Figure 1 displays the types that will be available when the child is NOT under IFSP. Figure 2 displays the types that will be available when the child is under IFSP. (Note: the user can read more about the service types by select the blue information or “i” icon located next to the types as shown in Figure 1.)

Figure 1. Service Visit Type(s) (NOT Under IFSP)
NOT Under IFSP Service Visit Types

Initial Eligibility Determination
The first visit to begin the process of establishing initial eligibility for Utah Part C services by use of appropriate evaluation and assessment procedures for a child who has been referred to the BWEIP.

Other Initial Eligibility Determination
All other visits or processes necessary to determine initial eligibility.

Initial IFSP Development
A meeting to develop the initial IFSP for a child who has been referred and determined eligible for Utah Part C services. This meeting shall be conducted within the 45 day period from time of referral.

Transition Meeting
Convened not fewer than 90 days and not more than 9 months before the child's 3rd birthday to discuss any services that the child may receive under Part B preschool. This meeting should include member(s) of the IFSP team, the family, and a representative of the LEA. (Note: Transition will only appear as an option when a child is NOT under IFSP. Otherwise, when I child is under IFSP, you should select Service Coordination.)
Consultation
Refers to an early intervention service visit to a child and their family by a service provider who is NOT listed as a service provider on the child's IFSP.

Supervisory
Refers to an early intervention service visit to a child and their family by a service provider who is acting in a supervisory role on the child's IFSP.

Under IFSP Service Visit Types

Ongoing Assessment
The process used by qualified personnel to identify a child's strengths, needs, and appropriate EI services throughout a child's eligibility for Utah Part C services.

Ongoing IFSP Development
Amendments to a child's current IFSP, or any other non-IFSP visits, to an eligible and enrolled child and their family.

Annual IFSP Meeting
A meeting is conducted on an annual basis in order to evaluate and revise the IFSP for a child and their family, and to determine ongoing eligibility for Utah Part C services.

Periodic Review
A review of the child's IFSP every 6 months or more frequently if necessary, or if the family request such a review. The purpose of the periodic review is to determine progress toward achieving the results or outcomes identified in the IFSP and identify any need for modification or revisions of goals and services on the IFSP.

Consultation
Refers to an early intervention service visit to a child and their family by a service provider who is NOT listed as a service provider on the child's IFSP.

Supervisory
Refers to an early intervention service visit to a child and their family by a service provider who is acting in a supervisory role on the child's IFSP.

Associated Visit Entry Process
1. Eligibility Determination(s) Process

Selecting an Eligibility Determination Type

Step 1: A visit will now need to be associated with the date assessments are entered in BTOTS under the eligibility tab.

Step 1a: Go to the “Visit” tab and select “Add Visit.” Enter the visit date, visit status, time in, time out, and service setting. Next, select “Service Type (select the appropriate eligibility determination type based on the definitions found on the blue “i” icon), enter the provider, and the length as shown in Figure 3. Click save.

Figure 3. Eligibility Determination Type

Step 2: Go to the “Eligibility” tab and select “Add Assessment.” The “Service Visit Date” will now appear and be tied to the visit you just entered as shown in Figure 4.

(Note: Remember you must enter a visit first for this date to appear. Otherwise the box will be empty, and you will prompted by an alert to enter an associated visit. See screenshots 5 and 6 for more information.)
If a visit is not entered first, you will be able to move forward with entering an eligibility assessment; however, you will be shown a warning as shown in Figure 5, and you will be prompted by an alert later to enter in an associated visit as shown in Figure 6.

**Figure 4. Eligibility Determination Associated Visit Date**

![Image of Eligibility Determination Associated Visit Date]

**Figure 5. Associated Visit Warning - Eligibility/Assessments**

![Image of Associated Visit Warning]

**Figure 6. Associated Visit Alert – Eligibility/Assessments**

![Image of Associated Visit Alert]

<table>
<thead>
<tr>
<th>Alert Date</th>
<th>Type</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/29/2016</td>
<td>EI</td>
<td>Associated visit missing for one or more assessments.</td>
</tr>
</tbody>
</table>
2. Initial IFSP Development Type Process

The “Initial IFSP Development” service visit type will be used for initial IFSP work.

(NOTE: All other IFSP work will need to be under service coordination when adding a visit.)

**Step 1:** Go to the “Visit” tab and select “Add Visit.” Enter the visit date, visit status, time in, time out, and service setting. Next, select “Initial IFSP Development,” enter the provider, and the length as shown in Figure 7. Click save.

![Figure 7. Initial IFSP Development Type](image)

**Step 2:** Under the “Child Actions,” select “Create Initial IFSP.” Complete all steps in the wizard. Notice on the Initial IFSP details step there is now a category labeled “Initial IFSP Development Service Visits” as shown in Figure 8. The visit entered on step 1 above will now tie into this step.
If a visit is not entered first, you will be able to move forward with entering an Initial IFSP; however, you will be shown a warning as shown in Figure 9, and you will be prompted by an alert later to enter in an associated visit as shown in Figure 10.
3. Transition Meeting Type Process
(Note: Transition will only appear as an option when a child is NOT under IFSP. Otherwise, when a child is under IFSP, you should select Service Coordination.)

Step 1: Go to the “Visit” tab and select “Add Visit.” Enter the visit date, visit status, time in, time out, and service setting. Next, select “Transition Meeting,” enter the provider, and the length as shown in Figure 11. Click save.

![Figure 11. Transition Meeting Type]
**Step 2:** Go to the “Transition” Tab. Navigate to the “Conference: Special Education” sub-tab. Click “Edit Transition Conference” as shown in Figure 12.

![Figure 12. Transition Conference: Special Education](image)

**Step 3:** Enter the prior notice sent date and transition conference status. The associated visit will now be available that you entered a visit for with the type “Transition Meeting” as shown in Figure 13.

![Figure 13. Transition Conference: Special Education](image)
If a visit is not entered first, you will be able to move forward with entering the Transition Meeting; however, you will be shown a warning as shown in Figure 14, and you will be prompted by an alert later to enter in an associated visit as shown in Figure 15.

**Figure 14. Associated Visit Warning - Transition**

![Associated Visit Warning - Transition](image)

**Figure 15. Associated Visit Alert - Transition**

![Associated Visit Alert - Transition](image)