



Quarterly and Semi-Annual Reports

Per [Title 17](#), all Level 2 and 3 Regional Center facilities are required to prepare written semi-annual reports of consumer progress toward achievement of each IPP objective for which the facility is responsible. In addition, Level 4 facilities must prepare and submit Quarterly Reports. Many Regional Centers stipulate in the Admission Agreement or Provider Contract that all levels must prepare Quarterly Reports and we recommend you inquire with your Regional Center to see if this applies.

Quarterly and Semi-Annual Reports must include:

- A summary of the data collected for each Individual Program Plan (IPP) objective for which the facility is responsible for (Level 3 and 4 facilities only); community and leisure activities; overnight visits away from the facility; illness, medical and dental visits; and Special Incident Reports.
- The date of completion of the report and signature of the person preparing the report.
- For Level 4 facilities, the identification of barriers to consumer progress and actions taken in response to these barriers.

Level 4 facilities shall submit the Quarterly Report to the Service Coordinator (Client Program Coordinator, etc.) within 30 days of the end of the quarter.

Quarterly or Semi-Annual Reports should be completed within 30-days of the end of the quarter or semi-annual period. These periods begin with the birth month of the consumer. To assist you in submitting your reports on time, we will provide a printed Quarterly or Semi-Annual Report schedule free of charge.

RA Mears Consulting can prepare your *Quarterly or Semi-Annual Reports* using information you provide us.

Price: \$40 for 1-2 objectives

Price: \$45 for 3-4 objectives

Price: \$50 for 5-6 objectives

Price: \$60 for 7 objectives or more

Note: See our [Products & Services Price List](#) and [Policies](#) for full details. You are accountable for knowing the contents of your *Quarterly and Semi-Annual Reports* and for providing the services therein. To this end, RA Mears Consulting will provide an overview of any documentation provided to you, as needed.

Quarterly and Semi-Annual Reports will be sent by email, or regular mail, as agreed on. *Quarterly and Semi-Annual Reports* delivered electronically will be in non-modifiable PDF format and *will not* be provided in a modifiable format (e.g., DOC, TXT), however, we are willing to make changes to meet your needs. Please contact us to discuss your specific requirements. RA Mears Consulting will make any revisions to *our work* required by the Regional Center for *initial* approval without additional charge to you.