



Bloom ABA

OAP GUIDE

OAP Funding Review Workbook

Step-by-step preparation for your annual plan review.

Before your review

- ☐ Gather progress notes or data summaries from every provider your child sees
- ☐ Write a short list of new goals or challenges that have come up since the last review
- ☐ Note any changes in your child's needs, school placement, or home situation
- ☐ Confirm the current review date and what documentation AccessOAP expects

Progress summary worksheet

For each active goal or service, jot down a short, honest summary. This becomes the backbone of your review conversation.

TEMPLATE — REPEAT PER GOAL

Goal/service: _____ Progress since last review: _____ Still a priority? Y / N
 New concern, if any: _____

Questions to bring to your review

- Has my child's assessed level of need changed since the last determination?
- What evidence best supports an adjustment to my funding, if one is needed?
- Are there services we are not currently using that might now be appropriate?
- What is the timeline for any changes to take effect?

Building the case for updated funding

If your child's needs have grown, concrete evidence matters more than a general impression. Strong documentation includes:

- Specific data from your provider showing progress has plateaued or a new need has emerged
- A short letter from a treating clinician describing the change in needs, if available
- Examples of how the current funding level is or isn't meeting daily needs at home and school
- Any recent school documentation (IEP updates, new accommodations) that reflects a shift

REMINDER

Review timelines and processes can change — always confirm the current process directly with AccessOAP before your review date.

Bloom ABA helps families prepare for OAP reviews using real session data, not guesswork. Book a free planning call at bloomaba.ca/contact.