samegoal

Initial Referral, Evaluation, and Plan

- Referral
- Evaluation
- Plan

Referral

If a student is suspected of having a disability or being twice exceptional, they may be referred to Exceptional Student Education. If a student is suspected of only having a Gifted exceptionality, they should instead be nominated for Gifted Education.

Steps *To initiate a referral to ESE:*

1. Create a **Referral for Initial Evaluation**.
2. Provide a reason for the referral and background information, including educational history and standardized test scores.
    - Supporting documents may be included as an attachment.
3. Whoever is initiating the referral will sign and date the document.
4. Share the document with whoever will be receiving the referral (typically an ESE director).
    - Transfer document ownership to this person if future deadlines should be assigned to them.
5. Whoever is responsible for processing the referral should then sign and date.
6. Complete the document.

When the document is completed, the student will be placed under eligibility review for ESE.

Evaluation

After a referral has been made, the LEA will need to notify the parents within 30 calendar days of receipt of the referral and obtain parental consent to evaluate the student.

Steps *To notify the parents and obtain consent:*

1. Create a **Notice and Consent for Initial Evaluation**.
2. Enter the date.
3. Provide details about the referral and outline the evaluation plan.
4. Fill out the rest of the document and share the it with the parents.
5. You must also provide the parents with a copy of the **Procedural Safeguards**.
6. The parents should provide their decision and add the date and their signature in the **Consent** section. They can also optionally add their preferences about additional evaluation procedures.
7. Once the parents have responded, enter the **Date District Received**.
8. Mark the document complete.

If the parents consent to their child being evaluated, the school can begin the evaluation process. Once individual evaluations have been conducted, the IEP team and the parents should meet to review the evaluation findings and make an eligibility determination within 60 calendar days of receiving consent for the evaluation.

Steps *To evaluate a child for ESE:*

1. Create an **Evaluation Team Report**.
2. Select **Initial Evaluation** and provide relevant dates.
3. The document can be shared with all team members and all evaluators can fill out an **Individual Evaluator's Assessment** on their own after conducting their evaluation.
4. Once all of the assessments have been conducted, the evaluation team should meet to review findings and provide a summary in Section 2.
5. Have all meeting participants add their signature.
6. Mark the document complete.
7. To make an eligibility determination, create an **Eligibility Determination for ESE Services**.

8. Add the meeting date and select **Initial** for type of evaluation.
9. Meet to review the evaluation and fill out the Eligibility Checklists in Section 4 as needed.
10. Make an eligibility determination in Section 2 and provide specific information about the student's exceptionalities.
11. Once everyone comes to an agreement, add signatures.
12. Mark the document complete.

After a decision has been made, the LEA must notify the parents of their child's eligibility.

Steps *To notify the parents:*

1. Create a **Notice of Eligibility/Ineligibility**.
2. Enter the dates.
3. Summarize evaluation information.
4. Provide the eligibility determination.
    - If the student is eligible, select **The student is newly determined to be eligible for ESE services** and document each exceptionality.
    - If the student is not eligible, select **The student is initially determined ineligible for ESE services**.
5. Share the document with the parents.
6. Mark the document complete.

Plan

If a student is found to be eligible for ESE services, an IEP must be developed. Before meeting to review the plan, the LEA must invite the parents to the IEP meeting.

Steps *To invite the parents:*

1. Create an **IEP Meeting Notice**.
2. Enter the date.
3. Provide meeting details, including date, time, and location.
4. Select **Develop initial IEP** as the meeting purpose.
5. Fill out the rest of the document, including adding information about meeting participants.
6. Share the document with the parents.
7. The parents should indicate their plan to attend, enter the date, sign the document.
8. Once the parents have responded, enter the **Date District Received**.
9. Mark the document complete.

The IEP team and parents must then meet to develop the initial IEP. The IEP must be completed within 30 calendar days after the eligibility determination.

Steps *To develop the IEP:*

1. Create an **Individual Educational Plan**.
2. Enter the relevant dates and list the student's exceptionalities.
    - If the student is twice exceptional, (L) Gifted should be listed as an **Other Exceptionality**.
3. Select **Develop initial IEP** as the meeting purpose.
4. Develop the plan and fill out the rest of the document.
5. In Section 12, click **add Meeting** and have all meeting participants sign the document.
6. Mark the document complete and provide a copy to the parents.

Once the document is marked complete, if the student is twice exceptional, they will be badged in both ESE and Gifted Education.

An ESE Matrix of Services should be created for the student after their initial placement into Special Education.

Before the student can begin receiving ESE services, the LEA must notify the parents and obtain consent to provide services.

Steps *To notify the parents and obtain consent:*

1. Create a **Prior Written Notice**.
2. Enter the date.
3. Select **propose** the **educational placement of the child** or the **provision of a free appropriate public education to the child**.
4. Fill out the document and share the it with the parents.
5. Mark the document complete.
6. To obtain consent, either create a **Consent for the Initial Provision of ESE Services: Disability** or a **Consent for the Initial Provision of ESE Services: Disability and Giftedness (Twice Exceptional)** as needed.
7. Enter the date.
8. Fill out the document and share the it with the parents.
9. The parents should provide their decision and add the date and their signature.
10. Once the parents have responded, enter the **Date District Received**.
11. Mark the document complete.

If the parents consent to the provision of services, the student will be fully enrolled in the ESE program as well as the Gifted Education program if they are twice exceptional.

Students who are participating in the ESE program will need their IEP reviewed each year and should be reevaluated every three years.