samegoal

Initial Referral, Evaluation, and Plan

- Referral
- Evaluation
- Plan

Referral

If a child is suspected to have a disability, they may be referred to Special Education.

Steps *To initiate a referral to Special Education:*

1. Create a **Referral Form**.
2. Provide the name of the referring teacher.
3. Enter the date.
4. Select **Initial** for **Type of Evaluation Requested**.
5. Fill out student and parent demographic information.
6. Provide relevant referral information. If needed, add supporting documentation as an attachment.
7. Share the document with the special education staff member responsible for receiving referrals and transfer ownership to them.
8. The new owner of the document can review it and mark it complete.

After a referral has been made, the special education team will need to make a determination about whether or not the student will be evaluated. Once this decision has been made, the LEA will need to notify the parents within 14 school days of receipt of the referral. Additionally, if the student will be evaluated, the school will need to obtain parental consent within 14 school days of receipt of the referral.

Steps *To notify the parents and obtain consent:*

1. Create a **Notification of Decision Regarding a Request for an Evaluation**.
2. Enter the date.
3. Provide details about the referral.
4. Under **Request for Initial Evaluation**, select the option that says **an initial evaluation is deemed necessary at this time**.
5. Fill out the rest of the document and add a signature.
6. Share the document with the parents.
7. You must also provide the parents with a copy of the **Explanation of Procedural Safeguards**.
8. Mark the document complete.
9. Create a **Consent for Initial Evaluation**.
10. Enter the date.
11. Fill out the **Identification of Needed Assessments** table.
12. Share the document with the parents and be sure to give them **Can View and Sign** permission.
13. The parents can provide their consent decision and sign the document electronically.
14. Once the parents fill out the document, it can be completed.

Evaluation

If the parents consent to their child being evaluated for special education, the school can begin the evaluation process. Before meeting to review evaluation information, you must invite the parents to the meeting no later than 10 days prior to the proposed meeting date.

Steps *To invite the parents:*

1. Create a **Notification of Conference**.
2. Enter the date.
3. Provide meeting details, including date, time, and location.
4. Indicate that the purpose of the conference is **Initial Evaluation/Eligibility**.
    - If the team will also be developing the IEP during the meeting, also select **Initial Individualized Education Program** as a purpose.
5. Fill out the rest of the document and add a signature.
6. Share the document with the parents.
7. Mark the document complete.

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 school days of receiving consent for an evaluation.

Steps *To document evaluation findings:*

1. Create an **Individualized Education Program**.
2. Enter the date.
3. Select **Initial Evaluation/Eligibility** for the purpose of conference.
4. In Section A, click **add Documentation of Evaluation Results**.
5. Summarize findings from the evaluations.
6. In Section B, click **add Eligibility Determination (All Disabilities)**.
    - If the student has an SLD, you may add eligibility determination information in section D/E instead.
7. Fill out Determinant Factors questions, disability information, adverse effects information, and educational needs information.

8. Make an eligibility determination. In order for a student to qualify:
    - Answers to the Determinant Factors questions must all be **No**.
    - Student must have at least a primary disability.
    - Student must experience adverse effects.
9. Optionally, select **Initial IEP** as a purpose of conference and fill out IEP related sections if you are also developing the IEP during the meeting.
10. Fill out the rest of the document and add signatures on the Cover page.
11. Mark the document complete and provide a copy to the parents.

After the evaluation meeting, the LEA must send a notification to the parents of the IEP team's recommendations within 10 school days of the eligibility determination.

Steps *To notify the parents of recommendations:*

1. Create a **Notification of Conference Recommendations**.
2. Enter the date.
3. Provide meeting details.
4. Indicate what determination was made. If the student was determined to be eligible, select **Is eligible or continues to be eligible for special education and related services** and provide the eligibility category.
    - If an IEP was also developed during the meeting, you can also select **Will receive the special education and related services as listed in the IEP**.
5. Fill out the rest of the document and add a signature.
6. Share the document with the parents.
7. Mark the document complete.

Plan

If a student is found to be eligible for special education and related services, an IEP must be developed. The initial IEP can be developed at a separate meeting or during the evaluation meeting. If it is being done at a separate meeting, the LEA must invite the parents to the meeting no later than 10 days prior to the proposed meeting date.

Steps *To invite the parents:*

1. Create a **Notification of Conference**.
2. Enter the date.
3. Provide meeting details, including date, time, and location.
4. Indicate that the purpose of the conference is **Initial Individualized Education Program**.
5. Fill out the rest of the document and add a signature.
6. Share the document with the parents.
7. Mark the document complete.

The IEP team and parents must then meet to develop the initial IEP. The IEP must be completed within 30 days after the eligibility determination and no later than 60 school days after consent for an evaluation was received.

Steps *To develop the IEP:*

1. Create an **Individualized Education Program**.
2. Enter the date.
3. Select **Initial IEP** as the purpose of conference.
4. In Section G, click **add Present Levels of Academic, Developmental, and Functional Performance**.
5. Summarize the student's present levels of achievement.
6. In Section M, click **add Goals and Objectives/Benchmarks** for each goal that needs to be documented.
7. Provide goal and objective/benchmark information.
8. In Section N, click **add Education Accommodations and Supports**.
9. Add accommodations in each applicable area.

10. In Section O, click **add Assessment**.
11. Indicate which assessments the student will need accommodations for.
12. In Section P/Q, click **add Educational Services and Placement**.
13. Detail the supports the student will receive and provide dates.
14. Fill out the rest of the document and add signatures on the Cover page.
15. Mark the document complete and provide a copy to the parents.

After the IEP meeting, the LEA must send a notification to the parents of the IEP team's recommendations within 10 school days of the IEP.

Steps *To notify the parents of recommendations:*

1. Create a **Notification of Conference Recommendations**.
2. Enter the date.
3. Provide meeting details.
4. Indicate that the student **Will receive the special education and related services as listed in the IEP**.
5. Fill out the rest of the document and add a signature.
6. Share the document with the parents and be sure to give them **Can View and Sign** permission.
7. The parents can indicate whether they agree to waive the 10 day interval or disagree to waive the interval.
8. Once the parents fill out the document, it can be marked complete.

Before the student can be fully enrolled in the Special Education program, the parents must consent to the recommended services. Parental consent is due within 10 days of the initial IEP.

Steps *To obtain parental consent:*

1. Create a **Consent for Initial Provision of Special Ed. and Related Services**.
2. Enter the date.
3. Fill out the rest of the document and add a signature.
4. Share the document with the parents and be sure to give them **Can View and Sign** permission.
5. The parents can then provide their consent decision, sign off that they have received the necessary materials, and sign the document electronically.

6. Once the parents have filled out the document, it can be completed.

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