

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. Typically a general education teacher initiates the referral and special education staff will fill out the referral based on what they hear, but if the general education teacher has SameGoal access, they may fill out the referral themselves.

Steps *To initiate a special education referral:*

1. Create a **Referral for Evaluation**.
2. Provide background information including educational history and standardized test scores, and include supporting evidence.
 - 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 a special education 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 pre-enrolled in special education.
- A PWN will need to be completed within 30 days.
- A **Parent Consent** will need to be completed within 30 days.

- A **Parent Invitation** for evaluation will need to be completed within 90 days (or within 60 days of consent, whichever is sooner).
- An ETR will need to be completed within 90 days (or within 60 days of consent, whichever is sooner).

Evaluation

Before evaluating a student for special education, you will need to notify the parents, obtain their consent, and invite them to the evaluation meeting.

Steps *To communicate with parents:*

1. Create a **Prior Written Notice to Parents**.
2. The type of action taken should be **Proposes to initiate an initial evaluation**.
 - If the district refuses to initiate an initial evaluation, the student will be unenrolled when the document is completed.
3. Fill out the remainder of the document
4. Share the document with the parents and mark it complete.
5. Create a **Parent Consent for Evaluation**.
6. Select that it is an **Initial Evaluation**.
7. Share the document with the parents and provide them with a copy of Procedural Safeguards.
8. The parents will then either fill out **Part 1** in order to grant consent, or **Part 2** in order to refuse consent.
 - If the parents refuse consent, the student will be unenrolled when the document is completed.
9. Once the parents respond, **Part 3** can be filled out by a district representative. Enter the date received and sign the document.
10. Mark the document complete.
11. Create a **Parent Invitation**.
12. The purpose of the meeting should be **To determine eligibility for services as a child with a disability**.
13. Provide meeting details and specify the written notice number.
14. Share the document with the parents.
15. When the parents respond, mark the document complete.

Steps *To evaluate a child for special education:*

1. Create an **Evaluation Team Report**.
2. Select **Initial Evaluation** and provide relevant dates.

3. Add and fill out the appropriate planning form (Preschool Evaluation or School Age).
4. Share the document with the parents so they can sign off on the evaluation plan.
5. The document can be shared with all team members and all evaluators will fill out **Section 1** on their own after conducting their evaluation.
 - No predeterminations are made.
6. The evaluation team and parents can then meet to compare notes and provide a summary of findings in **Section 2**.
7. In **Section 4** make an eligibility determination.
 - In order to be eligible, the child's poor performance must not be due to lack of instruction, the child must have a disability, and the child must have an educational need for special instruction.
8. Once everyone comes to an agreement, add signatures and complete the document.

If the child is determined to be eligible for special education, when the document is completed:

- The student will be fully enrolled in special education.
- You will need to complete a parent invitation and an initial IEP.
- A reevaluation will need to be done in 3 years.

Plan

Steps *To develop the initial IEP:*

1. Create a **Parent Invitation**.
2. The purpose of the meeting should be **To develop, review, and/or revise the student's IEP**.
3. Provide meeting details and specify the written notice number.
4. Share the document with the parents.
5. When the parents respond, mark the document complete.
6. Create an **Individualized Education Program**.
7. The meeting type should be **Initial IEP**.
8. Provide relevant dates.
 - Next ETR should be due in 3 years.
 - Next IEP review should be due in 1 year.
9. Fill out the rest of the IEP.
10. Share the document with the parents and meet to review the plan.
11. In **Section 15**, have the parents fill out the **Initial IEP** section.
 - Parents must give initial consent in order for special education services to be provided.
12. Add signatures and complete the document.

When the plan is completed, a deadline will be calculated to complete another IEP parent invitation and an annual IEP review in 1 year.