

School Age: Initial Referral

- 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 Initial Evaluation**.
2. Select **School Age Special Education**.
3. Provide background information including educational history and standardized test scores, and include supporting evidence.
 - Supporting documents may be included as an attachment.
4. Whoever is initiating the referral will sign and date the document.
5. 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.
6. Whoever is responsible for processing the referral should then sign and date.
7. Complete the document.

Evaluation

Once the student has been referred for special education, the school must notify the parents and obtain consent to evaluate. The parents must be notified within 10 days of the referral.

Steps *To notify the parents and obtain consent:*

1. Create a **Prior Written Notice For Initial Evaluation and Request For Consent Form**.
2. Enter the date sent.
3. Under **Type of action proposed**, select **The school (LEA) proposes to conduct an initial evaluation**.
4. Fill out the remainder of the document
5. Share the document with the parents.
6. Once the parents respond, a staff member can fill out the **Date of Receipt** field and mark the document complete.

If the parents consent to an evaluation, the school may begin the evaluation process. The evaluation must be conducted within 60 days of consent.

Steps *To evaluate a child for special education:*

1. Create an **Evaluation Report**.
2. Enter the date of report.
3. Provide a reason for the referral.
4. Document sources of evaluation data.
5. Consider different determining factors and make a decision about whether or not the student's disability is a result of other factors. If it is a result of any other factors, the student is not eligible for services.
6. Provide a summary of findings.
7. Make an eligibility determination. In order to be eligible, the student must have a disability and need specially designed instruction.
8. Once everyone comes to an agreement, add signatures.
9. Provide a copy of the document to the parents and enter the **Date Report Provided to Parent**.

10. Mark the document complete.

Plan

If the student is found eligible for services, they will need an IEP developed. Before meeting to review the IEP, invite the parents to the meeting.

Steps *To invite the parents to the IEP meeting:*

1. Create an **Invitation to Participate in the IEP Team Meeting or Other Meeting**.
2. Enter the date sent.
3. The purpose should be **Develop an IEP, if your child is eligible, or continues to be eligible, for special education and related services**.
4. Provide information about the meeting.
5. Share the document with the parents.
6. The parents can then fill the document out with their plans to attend.
7. Once the parents respond, a staff member can fill out the **Date of Receipt** field and mark the document complete.

The IEP must be completed with 30 days of the evaluation.

Steps *To develop the IEP:*

1. Create an **Individualized Education Program**.
2. Enter the meeting date and select **Initial** as the meeting type.
3. Fill out the following sections:
 - Special Considerations (factors checked "Yes" must be addressed in the IEP)
 - Present Levels of Academic Achievement and Functional Performance
 - Transition Services (if student is 14+)
 - Participation in State and Local Assessments
 - Goals and Objectives
 - Special Education, Related Services, Supplementary Aids and Services, Program Modifications
 - Educational Placement
 - Educational Environment (only fill out Section A or Section B)
 - Communication Plan (if applicable)
 - FBA Worksheet and PBSP (if applicable)

4. Share the document with the parents and meet to review the plan.
5. All participants must sign the document.
6. The parents will also need to sign off that they received a copy of the **Procedural Safeguards Notice**.
7. Mark the document complete.

After the IEP is finalized, the school will need to notify the parents of the student's educational placement and obtain consent to provide services.

Steps *To notify the parents and obtain consent:*

1. Create a **Notice of Recommended Educational Placement/Prior Written Notice**.
2. Select **Proposes initial provision of special education and related services** as the type of action taken.
3. Provide details about the proposed action and recommended placement.
4. Enter in contact information.
5. Share the document with the parents and enter the date sent.
6. The parents can then provide their consent decision and sign the document.
7. Once the parents respond, a staff member can fill out the **Date of Receipt** field and mark the document complete.

Once the document is completed, if the parents granted their consent, the student will be enrolled in the program.