

# FILEMAKER FORMS AND CHECKLISTS

September 2011

The forms delineated on each of the checklists should be compiled in the order listed.  
The relevant checklist should then be attached on top of the forms sent to RCCSEC.  
If you have any questions, please contact us.

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Please note that all Notice and Consent forms are now available  
in Spanish on Filemaker

IEP forms in Spanish are available at <http://www.isbe.net/spec-ed/html/forms.htm>

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## **FILEMAKER NOTICE & CONSENT FORMS**

Parent/Guardian Notification of Decision Regarding A Request For An Evaluation

Parent/Guardian Consent for Initial Evaluation - Page 1

Parent/Guardian Consent for Reevaluation - Page 1

Parent/Guardian Consent for Evaluation - Domain Page - Page 2

Parent/Guardian Notification of Conference

Parent/Guardian Notification of Conference Recommendations

Parent/Guardian Consent for Initial Provision of Special Education Placement and Related Services

Parent/Guardian Notification of Individualized Education Program Amendment

Parent/Guardian Excusal of an Individualized Education Program Team Member  
(With Written Report Attached)

Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority (At Age 17)

Parent/Guardian Waiver of 10 Days Requirement

## FILEMAKER ELIGIBILITY & IEP FORMS – September 2011

Conference Summary Report

Documentation of Evaluation Results - 2 pages

Eligibility Determination - Other Than Specific Learning Disability

Documentation of Evaluation Results - Specific Learning Disability - 2 pages

Eligibility Determination - Specific Learning Disability - 2 pages

Eligibility Criteria Menu (Autism, Cognitive Disability, Deaf-Blindness, Deafness, Developmental Delay, Emotional Disability, Hearing Impairment, Multiple Disabilities, Orthopedic Impairment, Other Health Impairment, Specific Learning Disability, Speech or Language Impairment, Traumatic Brain Injury, Visual Impairment)

Present Levels of Academic Achievement and Functional Performance

Transition Plan - Page 1 (If 14½ or older)

Transition Plan - Page 2 (Address by age 14½ or if student will turn 14½ during the duration of the IEP)

Goals and Objectives/Benchmarks

Educational Accommodations and Supports

Assessment

Educational Services and Placement (A) - 2 pages

Educational Services and Placement (B) - 2 pages

Additional Notes/Information (If Applicable)

Functional Behavioral Assessment - 2 pages (If Appropriate)

Behavioral Intervention Plan - 2 pages (If Appropriate)

Manifestation Determination (If Appropriate)

Summary of Performance - 4 pages (Graduating Student or Drop-Out Only)

Post-School Data Collection Survey (1 year after graduation following state request)

Indicator 13 - Data Entry (If 14½ or older) Send to Coop only - No Copy to Parent

Facts Tracking Sheet

Report of Progress on Annual Goals

## RCCSEC Website Downloadable Forms

[www.rccsec.org](http://www.rccsec.org)

1. Section 504 Conference Summary
2. Notice of 504 Conference
3. Autism Parent/Guardian Consent
4. IAA Participation Guidelines 2007-08
5. Your Right to An Independent Evaluation
6. Occupational Therapy Screening Teacher Questionnaire
7. Occupational Therapy Physician Letter
8. Occupational Therapy Physician Prescription Form
9. OT/PT Notification of Consultation
10. Occupational Therapy/Physical Therapy Parent Consent for Screening
11. Physical Therapy Physician Prescription Form
12. Physical Therapy Screening
13. Referral for Autism Support Team
14. Consent for Release/Exchange of Confidential Information
15. Vision and Hearing Screening Form
16. Authorization for Social Work Services
17. Parent/Guardian Revocation of Consent for Placement in Special Education
18. Contact Summary
19. Social Developmental Study (For Initial Use)
20. Social Health Update
21. CRT Meeting Record
22. IEP Attachment for Students with Autism
23. Request for Screening and Consultation
24. School Report Form
25. Compiled IEP Forms Checklists
26. Incident Report Form
27. Home and Hospital IEP
28. Service Plan
29. OT Screening for Pre-K

**DATA REQUIRED TO ENTER  
NEW STUDENTS INTO FILEMAKER**

**ALL NEW STUDENTS:**

**First Name:** \_\_\_\_\_

**Middle Name (required):** \_\_\_\_\_

**Last Name:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

**Grade:** \_\_\_\_\_

**Gender:**      **Male**              **Female**

**Ethnicity:** \_\_\_\_\_

**SIS ID #:** \_\_\_\_\_

(Student Information System ID# - 9-digit State Issued ID issued for ALL students)

**Parent Name:** \_\_\_\_\_

**Foster Parent**                      **Yes**              **No**

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Resident District:** \_\_\_\_\_

**Serving School:** \_\_\_\_\_

**ADDITIONAL INFORMATION FOR MOVE IN STUDENTS ONLY:**

**\*If this is a move in student with an IEP please also provide the following:**

**Start Date:** \_\_\_\_\_

**Disability:** \_\_\_\_\_

**Previous School:** \_\_\_\_\_

**New Case Manager:** \_\_\_\_\_

Please call, e-mail or fax (893-8627) the information to RCCSEC for entry.

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or

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**IMPORTANT:**

**Send copies of ALL previous special education records to the coop immediately.**

**REQUESTED INITIAL EVALUATION  
MEETING HELD**

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Conference Summary Report - For Sign-In Purposes
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With written report attached) - If Appropriate
- Parent/Guardian Notification of Decision Regarding A Request For An Evaluation (Attach Written Parent Request for Evaluation - If Available)
- Parent/Guardian Consent for Evaluation - Domain Page - Page 2
- Parent/Guardian Notification of Conference Recommendations

**IF THE EVALUATION IS CONSIDERED APPROPRIATE PLEASE ADD:**

- Parent/Guardian Consent for Initial Evaluation - Page 1
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Vision and Hearing Screening (See [www.rccsec.org](http://www.rccsec.org) - Form 15)

**REQUESTED INITIAL EVALUATION - NO MEETING HELD  
EVALUATION NOT APPROPRIATE**

- Parent/Guardian Notification of Decision Regarding A Request For An Evaluation  
(Attach **Written** Parent Request for Evaluation)

**Note:** If a written request is unavailable, please assist the parent in writing a request to attach.

**REEVALUATION REQUEST  
MEETING HELD**

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With written report attached) - If Appropriate
- Conference Summary Report - For Sign-In Purposes
- Parent/Guardian Consent for Reevaluation - Page 1
- Parent/Guardian Consent for Evaluation - Domain Page - Page 2
- Parent/Guardian Notification of Decision Regarding A Request For An Evaluation
- Parent/Guardian Notification of Conference Recommendations
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Vision and Hearing Screening (If Requested – See [www.rccsec.org](http://www.rccsec.org) - Form 15)

**WAIVED REEVALUATION (ELIGIBILITY ONLY)  
MEETING IS REQUIRED**

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With written report attached) - If Appropriate
- Parent/Guardian Notification of Decision Regarding A Request For An Evaluation
- Parent/Guardian Consent for Reevaluation - Page 1
- Parent/Guardian Consent for Reevaluation - Domain Page - Page 2
- Conference Summary Report - For Sign-In Purposes
- Documentation of Evaluation Results (2 pages)
- Eligibility Determination - Other Than Specific Learning Disability (If Applicable)
- Documentation of Evaluation Results - Specific Learning Disability - 2 pages  
**Use this form for RTI students being entitled**
- Eligibility Determination - Specific Learning Disability - 2 pages (If Applicable)
- Eligibility Criteria Page(s) for Disabilities Considered and/or Determined  
(use of Specific Learning Disability page is discretionary)
- Parent/Guardian Notification of Conference Recommendations

**NOTES:**

If a meeting is held **without** the Annual Review, you **MUST** indicate on the Additional Notes/ Information or on the Parent/Guardian Notification of Conference Recommendations that **“The Previous IEP dated \_\_\_\_\_ was reviewed and remains in effect”**.

If held along **with** the Annual Review, please see the Annual Review checklist.

**REQUESTED INITIAL EVALUATION  
FOR RTI WITH MEETING HELD**

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With written report attached) - If Appropriate
- Parent/Guardian Notification of Decision Regarding A Request For An Evaluation
- Parent/Guardian Consent for Initial Evaluation - Page 1  
**Check that evaluation is appropriate even if no additional information is required**
- Parent/Guardian Consent for Evaluation - Domain Page - Page 2
- Parent/Guardian Notification of Conference Recommendations
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Vision and Hearing Screening (If Applicable – See [www.rccsec.org](http://www.rccsec.org) - Form 15)

## INITIAL ELIGIBILITY ONLY IEP

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With Written Report Attached - If Appropriate)
- Conference Summary Report
- Documentation of Evaluation Results - 2 pages
- Eligibility Determination - Other Than Specific Learning Disability (If Applicable)
- IEP Attachment for Students With Autism if Applicable (See [www.rccsec.org](http://www.rccsec.org) - Form 22)
- Documentation of Evaluation Results - Specific Learning Disability - 2 pages (If Applicable)
- Eligibility Determination - Specific Learning Disability - 2 pages (If Applicable)
- Eligibility Criteria Checklist(s) for Disabilities Considered (use of Specific Learning Disability page is discretionary)
- Additional Notes/Information (If Applicable)
- Applicable reports - Psychologist, Social Worker, S/L Pathologist, OT, PT, etc.
- Parent/Guardian Notification of Conference Recommendations

## IEP ELIGIBILITY & PLACEMENT INITIAL AND REEVALUATION

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member  
(With Written Report Attached - If Appropriate)
- Conference Summary Report
- Documentation of Evaluation Results - 2 pages
- Eligibility Determination - Other Than Specific Learning Disability (If Applicable)
- IEP Attachment for Students With Autism if Applicable (See [www.rccsec.org](http://www.rccsec.org) - Form 22)
- Documentation of Evaluation Results - Specific Learning Disability - 2 pages (If Applicable)
- Eligibility Determination - Specific Learning Disability - 2 pages (If Applicable)
- Eligibility Criteria Checklist(s) for Disabilities Considered (use of SLD page is discretionary)
- Present Levels of Academic Achievement and Functional Performance
- Transition Plan - Page 1 (If 14½ or older) - If Applicable
- Transition Plan - Page 2 - If Applicable  
(Address by age 14½ **or** if student will turn 14½ during the duration of the IEP)
- Goals and Objectives/Benchmarks
- Educational Accommodations and Supports
- Assessment
- Educational Services and Placement - 2 pages
- Additional Notes/Information (If Applicable)
- Functional Behavioral Assessment - 2 pages (If Appropriate)
- Behavioral Intervention Plan - 2 pages (If Appropriate)
- Indicator 13 - Data Entry (If 14½ or older) Send to Coop only - No Copy to Parent
- Applicable reports – Psychologist, Social Worker, OT, PT, SLP, etc.
- Parent/Guardian Consent for Initial Provision of Special Education Placement  
and Related Services **WHEN INITIALLY DETERMINED ELIGIBLE**
- Parent/Guardian Notification of Conference Recommendations

## ANNUAL REVIEW

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With written report attached) - If Appropriate
- Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority (At Age 17) - If Appropriate
- Conference Summary Report
- IEP Attachment for Students With Autism if Applicable (See [www.rccsec.org](http://www.rccsec.org) - Form 22)
- Present Levels of Academic Achievement and Functional Performance
- Transition Plan - Page 1 (If 14½ or older) - If Appropriate
- Transition Plan - Page 2 - If Appropriate (Address by age 14½ or if student will turn 14½ during the duration of the IEP)
- Goals and Objectives/Benchmarks
- Educational Accommodations and Supports
- Assessment
- Educational Services and Placement - 2 pages
- Additional Notes/Information (If Applicable)
- Functional Behavioral Assessment - 2 pages (If Appropriate)
- Behavioral Intervention Plan - 2 pages (If Appropriate)
- Summary of Performance - 4 pages (Graduating Student Only)
- Indicator 13 - Data Entry (If 14½ or older)  
*Send to Coop only - No Copy to Parent*
- Parent/Guardian Notification of Conference Recommendations
- Goals and Objectives/Benchmarks (When Completed From Previous IEP)
- Report of Progress on Annual Goals (When Completed From Previous IEP)

## IEP REVIEW ONLY - MEETING HELD

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With Written Report Attached - If Appropriate)
- Conference Summary Report
- All IEP pages where changes were made
- Additional Notes/Information (Explanation of changes made)
- Parent/Guardian Notification of Conference Recommendations

## IEP AMENDMENT WITH NO MEETING HELD

- Parent/Guardian Notification of Individualized Education Program Amendment
- All** IEP pages that have been revised

## MANIFESTATION DETERMINATION

- Parent/Guardian Notification of Conference
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With Written Report Attached - If Appropriate)
- Conference Summary Report
- Manifestation Determination
- Parent/Guardian Notification of Conference Recommendations

### **IF FOUND TO BE A MANIFESTATION - ALSO ATTACH:**

- Functional Behavioral Assessment - 2 pages
- Behavioral Intervention Plan - 2 pages
- All IEP pages that have been revised.**

## GRADUATION IEP & SENIOR ANNUAL REVIEW

- Parent/Guardian Notification of Conference with student's name included on the form.
- Parent/Guardian Waiver of 10 Days Requirement (If Applicable)
- Consent for Agency Invitation to Transition Meeting from Parent/Guardian OR Student, (if Age of Majority)
- Conference Summary Report
- Parent/Guardian Excusal of an Individualized Education Program Team Member (With Written Report Attached - If Appropriate)
- Transition Plan (two pages)
  - Update as appropriate for the remainder of the school term.
  - Goals and Objectives/Benchmarks (where appropriate for the remainder of the school year)
- Report of Progress on Annual Goals and Objective/Benchmarks from previous IEP
- Summary of Performance (Graduating only) – Be sure it is signed by student & person completing the form.
- Post School Data Collection Survey (signed copy)
- Parent/Guardian Notification of Conference Recommendations
  - Mark “student recommended for graduation” if appropriate
  - Add “contingent upon completion of all academic requirements” if there is a question as to whether or not the student will meet all graduation requirements.
  - Mark any other appropriate box if the student has completed the required graduation requirements, but will remain in school according to the IEP.

## **DISMISSAL FROM SPECIAL EDUCATION IEP**

When dismissing a student from a special education eligibility, you **MUST** hold a reevaluation or a waived reevaluation meeting. Please follow the appropriate checklist above for the appropriate paperwork.

### **DISMISSAL FROM SPEECH/LANGUAGE AS A PRIMARY OR SECONDARY ELIGIBILITY**

Hold an IEP meeting. Complete a Referral for a Reevaluation. Conduct the domain analysis, with particular focus on Communicative Status. If enough data is available, then have parent sign to agree that no testing is needed (follow Waived Reevaluation Checklist above).

If available data is not sufficient, then conduct a reevaluation (follow Reevaluation Checklist above). Complete Eligibility IEP. Mark Not Eligible if student had been eligible for Speech/Language only. If student remains eligible under other categories, then only list the areas of eligibility and exclude Speech-Language. Remove Speech/Language services from the Educational Services and Placement page.

### **DISMISSAL FROM SPEECH/LANGUAGE AS A RELATED SERVICE**

Hold an IEP meeting. Document on the IEP goals that the student has met all speech/language goals and objectives. Consider explaining the dismissal on the Additional IEP Information page. Remove it as a related service on the Educational Services and Placement page.

## **INSTRUCTIONS FOR STEP SERVICES ON THE IEP (Secondary Transition Experience Program)**

STEP is a work-study program for students with disabilities who are at least 16 years of age. It is a program that is sponsored through the Illinois Department of Human Services/Division of Rehabilitation Services (DHS/DRS). As such, all students enrolled in STEP must be deemed “eligible” for services through DRS. Application and paperwork must be completed for both the STEP Pre-Vocational Coordinator and the DRS Counselor.

The purpose of STEP is to provide work-based experiences that will develop skills that will lead to competitive employment. Students receive academic credit towards graduation.

- a. Some students will be formally employed. Those students may work during the school day and/or outside the regular school hours.
- b. Other students will be subsidized with a small training stipend from the DRS grant to help them learn money management skills. Such students are not considered employees at their work site. However, they are to act and be treated as a standard employee in order to learn appropriate work skills.
- c. Students who receive a stipend may work only during the time that a Vocational Coordinator is working. This means that a student on stipend will not be working past 4:00 p.m. without special approval and will only be required to work on days that school is in session.
- d. One of the factors that typically dictates whether or not a student will receive a stipend is whether or not personal transportation to and from work is readily available. Without reliable transportation, students will need to be placed within walking distance or along an existing bus route. When this happens, the limited time that a student can work typically eliminates employers willing to pay the student.
- e. When referring a student to STEP make sure that there is time in the student’s academic and extracurricular schedule for regularly scheduled “employment”. Scheduling conflicts with College Express, sports, band, driver’s education, or required classes may keep a student from participating in STEP.
- f. *What form(s) should be completed*

### ***Educational Services Page under Related Services and/or Conference Notes***

When an IEP is created in the spring, prior to the final placement of the student, it is difficult to know if the student will be placed in an employer-paid position or receive a stipend. Therefore, the IEP paperwork should reflect the information that is known at that time:

- i. If the student is already employed in the community, designate on the “**related services**” page that the student is to receive STEP services. Indicate that the student is being served “**outside special education**” with the average minutes that the student works per week. This could create an “instructional day” that exceeds the normal school day.
- ii. If the placement of the student is unknown for the upcoming school year, indicate on the **conference notes** that the student is being referred to STEP and that an amendment will be sent after the student is placed in the fall. (Formal enrollment in STEP can only occur AFTER DRS deems the student eligible and that typically occurs after the start of the school year.)
- iii. Once the student is placed, or any other ensuing change in placement is made, ***an amendment to the IEP should identify the type of placement.***
  - If the student is receiving a stipend it will be considered “**within special education**” and the number of minutes will typically be a portion of the standard instructional day.
  - If the student is paid by the employer in the community it will be considered “**outside of special education**”. The number of minutes may exceed that of a standard instructional day.
  - It is possible for a student enrolled in STEP to have an “extended school day”. Students who attend work beyond the standard day may receive additional academic credit at the discretion of the IEP team.

On the Educational Services Page under “related services,” select code “**27 Transition/STEP by Division of Rehabilitation Services (DRS)**” to show that STEP is the related service that the student is receiving.

## Determining Educational Environment Coding for Students with Disabilities Participating in DRS Secondary Transitional Experience Programs (STEP)

### Criteria to be considered General Education Environment

A student's educational environment can be recorded as general education when the student is in a *competitive employment* position with the following components:

- In the *community* (e.g., outside of the school campus)
- Student receives *at least minimum wage* reimbursement and if applicable, fringe benefits
- *Integrated job site...*
  - where most co-workers do not have disabilities and individuals with disabilities are not part of a work group of other individuals with disabilities, *or*
  - where most co-workers do not have disabilities *and* if a job site as described above is not possible, individuals are part of a small work group of not more than 8 individuals with disabilities, *or*
  - if there are no co-workers or the only co-workers are members of a small work group of not more than 8 individuals (all of whom have disabilities), individuals with disabilities have regular contact with non-disabled individuals *other than* personnel providing support services in the work setting.
- *Unsubsidized* – wages are paid in full by the employer and there are no reimbursements from any sources, i.e., DHS/DRS, WIA, etc.

### Criteria to be considered Special Education Environment

A student's educational environment is recorded as special education when he/she does not yet meet competitive employment standards and includes one or more of the following STEP components:

- *Work-related class* (e.g., STEP classroom experience in career exploration, job seeking skills, etc.)
- *Job Shadowing* (e.g. learning about a job by spending time with a person who is working in a career)
- *Job Coaching* – on-the-job support provided by school personnel
- *Independent Living Skills Training* (e.g., classroom or community-based instruction, provided/supervised by school personnel, in skill areas other than vocational development such as transportation, meal preparation, household management, etc.)
- *On the Job Evaluation/Training (OJE/OJT)* (e.g., a training experience where a person is evaluated in terms of aptitudes and abilities, work speed, work skills ability to learn, quality of work performed and work behaviors) OJE/OJT is used to develop basic job skills that would lead to competitive employment
- *OJE/OJT Funded Training* - refers to funds used for evaluation, training, and supervision of students who do not meet competitive employment standards. Includes a payment schedule that increases employer participation based on the student's progress.
- *On-Campus Experiences* (e.g., experience in any school setting, closely supervised...often a student's first training experience in preparation for community placements and/or competitive employment)

## **TRANSFER STUDENTS WITH IEPS**

When a student with an IEP moves into a new district, there are several possible scenarios. First, the student could be moving in from another district in Illinois and the new district can gain copies of the current IEP. Secondly, a student could be moving in from another state and the new district can gain copies of the current IEP. Thirdly, the student could be moving in from anywhere and the new district cannot gain copies of the current IEP. The most important thing to remember is that the new district is responsible for providing a Free and Appropriate Public Education. This includes providing special education and related services in conformity with an IEP.

### **Transfers from within Illinois**

**Step 1:** Enroll the child.

**Step 2:** **To the extent possible, provide services comparable to those in the IEP from the former school district.**

**Step 3:** Either adopt the IEP from the former school district (if current, no meeting is needed) or develop, adopt and implement a new IEP. If the plan is to develop a new IEP, within 10 days after the date of the child's enrollment the school district must provide written notice to the parents, including the proposed date of the IEP meeting. Since the parents have the right to a 10-day notice of any IEP meeting, this would mean that the district would have a MAXIMUM of 20 days to notify parents and develop, adopt and implement a new IEP. **Additional forms may be needed if making any changes to the IEP.**

### **Transfers from another state**

**Step 1:** Enroll the child.

**Step 2:** **To the extent possible, provide services comparable to those in the IEP from the former school district.** If determined necessary, the school district may conduct an evaluation (as long as it continues to provide the services in the current IEP) or develop, adopt and implement a new IEP. **Additional forms may be needed if making any changes to the IEP.**

**Step 3:** If the plan is to develop a new IEP, within 10 days after the date of the child's enrollment the school district must provide written notice to the parents, including the proposed date of the IEP meeting. Since the parents have the right to a 10-day notice of any IEP meeting, this would mean that the district would have a MAXIMUM of 20 days to notify parents and develop, adopt and implement a new IEP. **Additional forms may be needed if making any changes to the IEP.**

**The school district must take reasonable steps to obtain a copy of the child's records, including the IEP from the former school district. If a copy is not received, the following steps should be followed.**

**Step 1.** Enroll the child.

**Step 2.** Serve the child in a setting the school district believes will meet the child's needs until the current IEP is obtained or a new IEP is developed. In this case, the school district must provide written notice to the parents, including the proposed date of the IEP meeting. Since the parents have the right to a 10-day notice of any IEP meeting, this would mean that the district would have a MAXIMUM of 20 days to notify parents and develop, adopt and implement a new IEP.

## ARCHIVING IEPS

Please call or e-mail our office to have your Current IEP Archived prior to beginning to write your Annual Reviews or prior to writing a New IEP that will also include New Goals.

If a student's Current IEP has been Archived in preparation for your new Annual Review, please remember to continue to update the Current IEP Goal Progress and complete the Report of Progress on Annual Goals in the Archived Files each quarter.

### **Instructions follow:**

- Find your Student
- On the Main Filemaker Menu click Go To Archive Files (The Archive File always has a pink background)
- Enter your Individual Log In Name and your Pin (you will be asked for this each time you enter the Archive Files)
- Verify student's name on the main page (if not, repeat the search for your student)
- Look at the Message Board at the bottom of the main screen - click on Sort Archive Records (this will bring the most current archived IEP to the beginning of the Archived IEPs).
- Click on Eligibility/IEP Program
- Proceed to Goals and Objectives or the Report of Progress on Annual Goals
- Enter your progress data and print out hard copies
- When complete - click Main Menu
- Click Go To Current Files to return to the regular Filemaker menu

The Goals and Objectives and the Report of Progress on Annual Goals are the only pages that can have data entered in the Archive File.

## ACCESSING ARCHIVED FILES

Filemaker Main Menu - click *Go to Archive Files*

Enter your *Log-In Name* (last name & first initial) and Pin (last 4 digits of your SS#)

You are now in the Archive Files (pink background)

Click *Enter Find* and enter the name of your student

Click *Perform Find*

When your student has been found - click *Sort Archive Records* (located on the Message Board)

This will sort the archived IEPS into chronological order, with the most current on top.

Click *Eligibility/IEP Program*

You can then access *Goals* and the *Report of Progress on Annual Goals*. These are the **only** areas which can be altered in the archived file, however, all areas can be printed or reviewed.

After entering progress on both the Goals and the Report of Progress, print the pages out.

(Copies **must** be sent to the coop once the IEP has been completed.)

### **To Exit the Archive Files**

Click *Go to Current Files* from the Main Menu of the Archive Files