SPECIAL EDUCATION
PROCEDURE MANUAL
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OVERVIEW
Executive Summary

Two laws guide the implementation of special education services: the Individuals with Disabilities Education Act (IDEA) at the federal level and the Illinois Administrative Code at the state level. These laws outline legal mandates that must be met but do not provide any guidance as to how to meet them. That task is left up to local school districts such as Waukegan Public Schools to determine.

Due to the complexity of special education law, simple memos and periodic staff development will not suffice to provide the background and knowledge needed to assist staff in meeting the requirements of the law. Therefore, in an effort to properly implement IDEA 2004 and improve the quality of the special education services provided to our students, this document will provide the “how to” portion that the law does not—the Special Education Procedure Manual.

This manual is a “work in progress” and will be added to and updated as the law changes and our implementation of special education improves.
District Mission Statement, Shared Values & Strategies

Mission Statement

“Educating students for the world of tomorrow is our top priority. Through mobilization of the entire community, we will challenge, teach and inspire our students. We will provide the resources to serve each of our students, expecting excellence from all. We will deliver an exciting education in a safe learning environment that celebrates our differences and similarities in a spirit of unity and respect.”

Shared Values

• All students can learn.

• We will mobilize the entire community to provide programs, resources, and services that ensure success for all students.

• We will challenge, teach, and inspire all students to reach their full potential.

• We will provide resources to ensure that all students will acquire the skills to succeed in all facets of the world of tomorrow.

• We will serve all students and their families without bias.

• We expect excellence and accountability from students, families, teachers, administrators, board of education, staff and partners—no exceptions, no excuses.

• The family-school partnership is essential for success.

• We will deliver an exciting, quality education in an engaging, caring, highly motivating and inclusive environment.

• We will provide a safe learning and teaching environment for students and staff.
• We strengthen our community by celebrating our diversity: honoring and respecting our differences, and embracing our similarities.

• We will responsibly and fairly manage all resources entrusted to us, ensuring alignment with the shared values and mission of the school district.

• The status quo has got to go!!!

Strategies

• Become the nationally recognized leader in celebrating and profiting from diversity in the spirit of unity and respect.

• Actively engage all aspects of the community to invest in the success of the school district.

• Provide a quality, exciting education for each of our students in order to challenge and inspire them to excellence as they prepare for and shape the world of tomorrow.

• Provide the resources to ensure that each student excels.

• Expect and recognize excellence in students, families, staff, leaders, schools, and community partners.

• Provide a school environment that is safe, positive, and supportive.

• Develop the family-school partnership as the primary support for student achievement.
Continuum of Service Model

Typically, the type of service delivered to special education students is narrowly defined as the instruction provided by the special education teacher. As we embark on this new era of special education in Waukegan Public Schools, the type of service also needs to include the quality of the procedural process we implement. In order for our district to maintain compliance with the law and provide a quality education to special education students it is essential that every member of the team understand their responsibilities in relation to the procedural process that must be adhered to. The following responsibilities are in abbreviated format and in no way are a replacement for the district job descriptions.
Individual Roles and Responsibilities

Special Education Program Coordinator/Specialist

- Provide technical assistance to Administrators, special education staff, general education staff and related services staff regarding all special education issues and procedures.
- Serve as LEA representative as required for selected IEP team meetings.
- Monitor referral, evaluation, eligibility, IEP development, and placement process for students with disabilities.
- Facilitate the placement of students into special education programs that adhere to Federal, State, and District guidelines regarding least restrictive environment.
- Monitor District compliance of Federal and State legal mandates and advise staff regarding changes to District procedures.
- Complete Medicaid Administrative Outreach Time Study for Medicaid reimbursement.

Building Administrator

- Serve as LEA representative at IEP meetings for all students with disabilities beginning in the January of 2009.
- Coordinate and implement building level special education services.
- Monitor school level compliance with Federal and State legal mandates.
- Assure that District problem-solving procedures have been followed prior to initiating a referral for a case study evaluation.
- Provide technical assistance to general education and special education teachers in working with students with disabilities.
Special Education Teacher (Case Manager)

- Monitor timelines for students on caseload to assure that legal mandates are met.
- Complete appropriate educational assessments for assigned students.
- Schedule meetings required by legal guidelines or as requested by parents, building administration or central office administration.
- Serve as a team member for assigned students’ Individual Education Program (IEP) meetings.
- Provide the IEP Team with suggested goals and benchmarks based on evaluation results.
- Assure that all required paperwork is completed during IEP team meetings.
- Maintain a legally written IEP for each child on caseload
- Complete designated forms related to assigned student as outlined in ExcentTera procedural manual.
- Assist in maintaining school based confidential records as outlined in the procedural manual.
- Participate in the development, management and implementation of Behavior Intervention Plans including Functional Behavioral Assessment and Manifestation Determination.

Assistant

- Implement lesson plans as specified by the teacher.
- Administer non-standardized tests under the instruction of the teacher.
- Carry out activities to meet student/class objectives.
- Reinforce and supervise practice of skills with individual and small groups.
- Observe behavior and carry out behavior management strategies.
- Participate in parent conferences when appropriate.
- Share ideas and concerns during conferences and carry out duties as directed by the teacher.
Related Services Staff

- Complete appropriate assessments as requested by the IEP Team.
- Serve as team member for assigned students’ Individual Education Plan meetings.
- Provide the IEP Team with suggested goals and benchmarks specific to area based on evaluation results.
- Maintain evaluation and treatment records as appropriate within the school based confidential folder.
- Participate in district Child Find activities
- Participate in the development, management and implementation of Behavior Intervention Plans including Functional Behavioral Assessment and Manifestation Determination.
- Complete Medicaid Fee for Service Time Study for Medicaid reimbursement.
Conclusion

The goals of the Special Education Program in Waukegan Public Schools are to: (1) maintain compliance with the law; (2) consistently apply District procedures; (3) ensure that students who truly meet eligibility criteria are enrolled in special education; (4) fully implement the continuum of services and (5) be proactive in meeting the needs of special education students.
REFERRAL FOR EVALUATION
Referral for an Initial Evaluation

School Problem Solving Team

Prior to determining if a child should be referred for a full case study evaluation the burden is on the school to establish whether or not the child has received a quality regular education, or more specifically, every possible assistance or intervention in order to master the skills presented. This requirement presents the need for schools to organize into teams to problem solve, examine student skill levels, identify areas of need by reviewing data, determine interventions, develop a plan of implementation, review data collected as a result of implementation, and determine effectiveness and additional interventions if needed. This process is commonly called problem solving however it has been rejuvenated recently as a result of the Response-to-Intervention requirement in IDEA 2004.

Most importantly, a student will not proceed to full case study evaluation unless he or she has participated in a quality problem solving process, involving interventions. Although this initiative has been widely publicized as a regular education initiative, special education staff will play pivotal roles. In order to assure the success of this initiative all staff members will receive additional training on this process.

Parent/Guardian or Outside Professional Referral

Step 1:

At a minimum, the problem solving team must review:

- The data gathered by the problem solving team, which should include existing evaluation data;
- Classroom based assessments;
- Observations of the child related to the suspected disability;
- Information obtained from the classroom teacher
- And the information obtained from the parents.

The problem solving team’s responsibility is to then determine whether additional data or information is needed and ultimately to determine if there is sufficient evidence to suggest that the student would likely meet the initial eligibility criteria for one of the eligibility (?) categories.

Step 2:

If the special education referral team determines that:

There is insufficient evidence to warrant an evaluation for special education eligibility, written notice must be provided to the parent of the district's refusal to conduct an evaluation and why by the school Psychologist. This written notice must come from the school Psychologist within 14 school days of receiving the request for evaluation (Appendix A: Parent/Guardian Notification of Decision Regarding Referral).
If the problem solving team determines that there is sufficient evidence to suggest that the student has a suspected disability then: The School Psychologist must provide written notice to the parent of the intent to proceed with an initial evaluation within 14 school days. This written notice should include an invitation to the evaluation planning (domain) meeting and a copy of the procedural safeguards in the parent's native language.

Step 3:

At the time of the evaluation planning (domain) meeting, the problem solving team must determine appropriate assessments necessary to complete the evaluation. For each domain, the consent for evaluation shall either describe the needed assessments or explain why none are needed.

Step 4:

Written parental permission must be obtained before the initial evaluation can commence. This permission must identify all of the evaluation tools and procedures that will be used (see Consent for Evaluation Procedures).

Step 5:

Once parents have been notified and written permission for the initial evaluation has been obtained the initial evaluation team must complete the evaluation within 60 school days.

Special Circumstances are defined as circumstances outside the district's control. Lack of availability of qualified staff is not considered a special circumstance.

Step 6:

Develop an IEP if the student is eligible for services. An IEP meeting can be conducted on the date of eligibility meeting or within 30 school days of the date evaluation is completed. The whole process of evaluation and the completed IEP must be completed within 60 school days of when parental permission was obtained.

NOTE: A parent or adult student may revoke consent at any time before the completion of the activity or action for which they have given consent. If a parent or adult student revokes consent, that revocation is not retroactive. A parent or adult student may revoke consent for evaluation or reevaluation that has not yet been conducted. A parent or adult student may revoke consent for initial special education placement before the initiation of that placement.
Child Find

Child Find Requirements (Chart 2a)

The district is required by law and will make every effort to identify, evaluate, and serve any student in our attendance area who may have a suspected disability, which would qualify them for special education services.

Once a building team (Problem Solving Team), or other referring party, has completed and documented appropriate interventions and suspects a student may have a disability that adversely impacts the student's educational performance, a special education evaluation may be in order. The referral must include all relevant information and data collected from the process. This information then goes to the evaluation team.

Students Identified as English Language Learners (Chart 2b)

The right to receive special education services applies to all students. It is not limited only to students who speak English. However, completing a referral for a student who is not a native English speaker can pose challenges. It is critical that a students’ English language acquisition not be mistaken for learning deficits requiring the services of special education. We must determine if the student is struggling academically due to not understanding the English language or if there is truly a disability that requires special education services.

The process for conducting a case study evaluation is largely the same for a native English speaker or a student who has been identified as an English Language Learner (ELL) except that the evaluation tool may be different. For any English Language Learner the IEP Team must identify the appropriate type of evaluation (Chart 2b).

Native Spanish Speaker: If the student is a native Spanish speaker, he/she will be referred to the Bilingual Assessor for testing to assess proficiencies in both English and Spanish (Appendix B: Referral for English Language Proficiency Evaluation).

Native Speaker in a language other than English or Spanish: If the student is a native speaker in another language besides English or Spanish, he/she will be referred to the Bilingual Assessor for testing to assess proficiency in English.

Language proficiency data will be used to determine if the student requires an evaluation in English, a bilingual evaluation or a non-verbal cognitive evaluation.
Chart 2a: Child Find

**Director of Leadership and District Initiatives**

**Child Find Responsibilities**

**Director of Special Education**

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**Early Childhood Program Coordinator**
Responsibilities Under Pre School for All /Pre K
- Screening Pre-K Eligibility
- Grant Oversight
- 4-5 Oversight
- Pre-K Program Training and Support
- Principal support and oversight
- Special Education Training and Support

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**Department of Child Find**
- Collect Referrals from all servicing agencies.
- Maintain database for all referrals and how they were directed.
- Assure compliance through monitoring timelines.
- Schedule Child Find Screenings
- Birth to 5 Registration Process
- Parent/Community Education

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**Child Find Coordinator**
Responsibilities under Child Find
- Birth – 21 referral and compliance
- Community Referrals
- Birth - 21 Child Find Oversight
- Medical and Parent Referrals
- Private, Parochial Special Education Birth - 21
- Home School

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**Designated Special Education Team**
Social Worker, Psychologist, Nurse, OT/PT, Speech/Language Pathologist, General Education and Special Education Teachers
Chart 2b: Students Identified as English Language Learners

Native Spanish Speaker.

Bilingual Assessor assesses proficiency levels in English and Spanish.

Native Speaker in language other than English or Spanish.

Bilingual Assessor conducts assessment.

ELL Teacher attends IEP Committee meeting to assist committee in making determination.

- English evaluation
- Bilingual evaluation
- English evaluation
- Non-verbal evaluation
EVALUATION PROCESS
Types of Evaluations

There are three types of evaluations: initial evaluation, reevaluation and independent evaluation. The following will identify procedures for completing re-evaluations and independent evaluations.

Reevaluation

Reevaluations of students with identified disabilities are required:
1. Every three years.
2. Prior to a change in eligibility.
3. If the child’s Parent or teacher requests a reevaluation.
4. When ordered by a hearing officer.

Reevaluation may or may not include formal assessment.

- Formal testing shall be done only when a question exists as to whether the student continues to be eligible for special education services.
- If no questions exist regarding the student’s eligibility, the IEP team may limit the reevaluation to a review of records, work samples, teacher reports and other anecdotal records.
- If the Parent/Guardian requests additional testing as part of the reevaluation process, the IEP team may complete whatever assessments are deemed appropriate to answer parent questions.

Responsibilities of the Psychologists in regards to completing reevaluations include:

Identify eligible students for reevaluation 60 days before the annual review date in order to ensure that reevaluation information is available at the annual review meeting.

Convene the IEP team to carefully consider what data and/or assessments are needed to determine ongoing eligibility for special education services.
Independent Evaluation

A parent has the right to initiate an Independent Educational Evaluation at public expense only after a district has conducted an evaluation, the parent disagrees with the results of that evaluation, and the parent initiates the independent evaluation, or contacts the District and notifies the District of their intent to initiate an independent evaluation after the parent has received the results of the district’s evaluation.

While the parent is not required to provide an explanation, the District will ask for an explanation of the area(s) of disagreement in order to work with the family in a proactive manner.

1. Parent/guardian requests independent evaluation

2. The school District will provide a list of independent educational evaluators
   (a. developed from ISBE www.isbe.net, b. another individual possessing the credentials)

3. If the Parent/Guardian disagree with the District’s evaluation and wish to obtain an evaluation at public expense, they shall submit the request in writing to the Director of Special Education Compliance.

4. If the District disagrees, the Director of Special Education Compliance shall initiate a due process to demonstrate the evaluation is appropriate within five days of the written request for an independent evaluation.

5. An independent evaluation at public expense shall be completed within 30 days after receipt of a parent’s written request. If an extension is required, both parties must agree in writing.

6. If during the due process hearing the District’s evaluation was shown to be appropriate, the parents can obtain an independent evaluation, but not at public expense.

7. If the District’s evaluation was inappropriate the District must pay for the independent evaluation.

8. Once the independent evaluation is completed, the written result of the evaluation must be considered by the IEP team. The District must send notice and convene an IEP meeting within 10 days.

9. The District must consider the results and make appropriate changes to the IEP to ensure a free appropriate public education to the student.
Evaluation Process

Consent for Evaluation (Appendix C: Consent for Evaluation)

Step 1:

The problem solving team shall ensure that a full and individual evaluation is conducted for each child being considered or reconsidered for special education and related services. The purpose of an evaluation is to determine:

- Whether the child has, or continues to have, one or more disabilities;
- The present levels of performance and educational needs of the child;
- Whether the disability is adversely affecting the child’s education;
- Whether the child needs, or continues to need, special education and related services; and
- Whether any additions or modifications to the child’s special education and related services are needed to enable the child to meet the goals set out in the Individualized Education Program (IEP) and to participate appropriately in the general curriculum.

An evaluation considers eight domains (areas related to the suspected disability) that may be relevant to the educational problems experienced by the individual child under consideration.

The nature and intensity of the evaluation, including which domains will be addressed, will vary depending on the needs of the student and the type of existing information already available.

The problem solving team, determines the specific assessments needed to evaluate the individual needs of the student. This team includes but is not limited to the following individuals:

- Student’s Parent(s)
- Regular education teacher
- Special education teacher
- Building administrator
- Individual who can interpret the evaluation results
- Qualified bilingual specialist or bilingual teacher, if needed

The problem solving team must complete all relevant information on the domain page prior to obtaining parental consent for evaluation. If the assessment is relevant to the evaluation check the yes box on the consent for evaluation page. If the assessment is not relevant to the evaluation check no. For example, if the team is doing a reevaluation for a student who has a learning disability a health update may be relevant to the evaluation, however if the student did not have OT/PT in the past and no recent motor issues the team would check “no” for the motor domain. Another example may be a student receiving speech only services, speech domain would be relevant, however social/emotional and motor would not be relevant. It is important to check yes or no to ensure team considered each domain during the planning meeting. If no assessment is needed, check “no additional data needed”.
Domains (Appendix D: Special Education Categories) include the following:

- Academic Performance
- Functional Performance
- Cognitive Functioning
- Communication Status
- Health
- Hearing/Vision
- Motor Abilities
- Social/Emotional Status

Step 2:

If the IEP team determines no additional evaluation data is needed, then the Psychologist will obtain parental agreement that NO additional assessment data is needed and no Parental consent is required.

Step 3:

The Psychologist will obtain Parental consent to collect additional evaluation data.

Timelines

1. The evaluation process, including the development of an individual education plan, shall be completed within 60 school days from the date written permission for evaluation was obtained from the child’s Parent/Guardian.
2. When a referral for evaluation is made with less than 60 school days of attendance remaining in the school year, the IEP Team will meet and discuss the referral. Should the team recommend an evaluation, that evaluation shall be completed prior to the end of the academic year.
3. Any evaluation in process but not completed prior to the end of the school year will be completed and an IEP (if applicable) be in place prior to the first day of the next school year.

If a situation arises in which it is not possible to complete an evaluation prior to the end of the school year, the Psychologists will notify the coordinator of the Psychology department and will complete the required summer checklist form (see appendix). The summer evaluation team will be notified of the evaluation.
Reporting Results

Upon the completion of an evaluation a written report of evaluation results must be developed. The report (Appendix E: Documentation of Evaluation Results) will follow guidelines as outlined in Illinois Administrative Code and include:

• Demographic data (reported on IEP form)
• Dates of assessment
• Reasons for referral
• Assessment methods used
• Results of assessment
• Interpretation of results, including student strengths and weaknesses; and
• A report of the classroom observation
DETERMINING ELIGIBILITY & COMPLETING AN IEP
General Information

Expectations

Building Principals, Special Education Coordinators and Specialists are the legal and programmatic leaders of special education implementation. At times IEP meetings can become heated and contentious as passionate people advocate for their position, they must maintain composure, be fair, impartial, seek external assistance when needed, and above all maintain compliance with the law.

When situations arise in which the team is unable or uncomfortable addressing, a date to reconvene should be scheduled and then the meeting should be recessed in order to consult with the Director of Special Education for Compliance and Monitoring or the Director of Special Education for Programs and Services to obtain further guidance.

IEP Team Composition

The special education team should include:

- Parent(s) of the student (Appendix F: Parent/Guardian Notification of Conference)
- Regular education teacher who is, or may be responsible for implementing the IEP
- Special education teacher who is, or may be responsible for implementing the IEP
- Representative of the local school district (LEA):
  - Qualified to supervise specially designed instruction
  - Knowledgeable about the general education curriculum
  - Knowledgeable about the availability of resources and the authority to commit resources
- An individual who can interpret the instructional implications of the evaluation results
- At the Parent(s) discretion, or the district’s, other individuals with knowledge or special expertise regarding the student
- Student, when appropriate
- When transition services must be planned, a representative of any agency that may be providing or paying for transition services
- With a child age three to five years old, and not yet entered into primary grades, the team shall include an individual qualified to teach preschool.
- Qualified bilingual specialist or bilingual teacher, if needed
- Representative of a State-operated or nonpublic facility, if it is anticipated that placement in a nonpublic facility will be considered
- Appropriate related service staff members who work with the student
- Sign Language/Bilingual interpreters as needed
Procedural Safeguards

Notice

1. Written procedural safeguards (Appendix G: Explanation of Procedural Safeguards) shall be given to the parent(s)/guardian(s) of a child with a disability a minimum of one time per year, however a copy must be given to the parent(s)/guardian(s):
   a. Upon a student’s initial referral for evaluation
   b. Upon receipt of the first State complaint and upon receipt of the first due process complaint
   c. In accordance with the discipline procedures, upon request of a parent.


3. The procedural safeguards notice shall include a full explanation of all of the procedural safeguards relating to:
   a. Independent educational evaluation;
   b. Prior written notice;
   c. Parental consent;
   d. Access to educational records;
   e. The filing of written complaints with the ISBE, including a description of how to file a complaint and the timeline.
   f. The availability of mediation.
   g. Procedures for students who are subject to placement in an interim alternative educational setting;
   h. Requirements for parent(s)/guardian(s) unilateral placement of students in private schools at public expense.
   i. Mediation;
   j. Due process hearings, including requirements for disclosure of evaluation results and recommendations;
   k. The student’s placement during the due process proceeding;
   l. Civil action; and
   m. Attorney fees.
IEP Meeting

Eligibility Determination

Once the initial evaluation has been completed, an eligibility team must meet to determine whether the data collected from the initial evaluation qualifies the student under one of the eligibility categories in IDEA.

The Documentation of Evaluation results form must be completed to document the results of the evaluation.

Written notice and a copy of the procedural safeguards written in the parent’s native language must be sent to the parent inviting them to the eligibility meeting.

The special education team should include:

• Student’s Parent(s) (Appendix F: Parent/Guardian Notification of Conference)
• Regular education teacher who is, or may be responsible for implementing the IEP
• Special education teacher who is, or may be responsible for implementing the IEP
• Representative of the local school district
  o Qualified to supervise specially designed instruction
  o Knowledgeable about the general education curriculum
  o Knowledgeable about the availability of LEA resources and the authority to commit resources
• Individual who can interpret the evaluation results
• At the discretion of the Parent(s) or the district, other individuals with knowledge or special expertise regarding the student
• Student, when appropriate
• In the case of a student for whom transition services must be planned, a representative of any agency that may be providing or paying for transition services
• For a child age three to five years old not yet entered into primary grade the team shall include an individual qualified to teach preschool.
• Qualified bilingual specialist or bilingual teacher, if needed
• Representative of a State-operated or nonpublic facility, if it is anticipated that placement in a nonpublic facility will be considered
• Appropriate related service staff members who work with the student
• Sign Language/Bilingual interpreters as needed
**Special Education Categories**

At the eligibility meeting, the team must examine the evidence obtained from the initial evaluation and determine if it meets the initial eligibility criteria (Appendix I: Eligibility Determination Criteria) under one of the 13 eligibility categories listed below:

1. Autism
2. Deaf-Blindness
3. Deafness
4. Emotional Disturbance
5. Hearing Impairment
6. Mental Retardation
7. Orthopedic Impairment
8. Other Health Impairment
9. Specific Learning Disability
10. Speech or Language Impairment
11. Multiple Disabilities
12. Traumatic Brain Injury
13. Vision Impairment

The team members must consider exclusionary and inclusionary factors to determine eligibility for each specific disability. Eligibility determinations are a team decision.

**Eligibility Under Specific Learning Disability**

The criteria for determining whether a child has a specific learning disability (SLD) under IDEA 2004 (1) must NOT require the use of a severe discrepancy between intellectual ability and achievement, (2) must permit the use of a process based on the child’s response to scientific, research-based intervention, (3) may permit the use of other alternative research-based procedures for determining whether a child has a specific learning disability.

**Steps to Problem Solving for Determining SLD:**

**Step 1:**

Define the problem the student is having in the general education curriculum.

**Step 2:**

Identify the student’s strengths and weaknesses in the area of concern.

**Step 3:**

Identify all attempted interventions and student results.
Step 4:

Report the student’s progress over time as a result of the interventions.

Step 5:

State the discrepancy between the student’s performance and the grade-level benchmark.

Step 6:

Identify the student’s instructional needs, specify: materials, personnel, amount of time, setting, progress monitoring schedule, and how interventions are more intense and significantly different from the general education peers/curriculum.

Step 7:

Consider exclusionary factors of lack of appropriate instruction in reading and math. The team must be able to show documentation the student was taught by qualified personnel and received appropriate instruction. Evidence may include IPF forms, CBM data, progress reports, report cards, assessment data and reading and math assessments from the curricula.

Step 8:

Consider the exclusionary factor of Limited English proficiency.

Step 9:

Determine if the student is eligible for special education under the specific learning eligibility category.

Step 10:

Sign the Eligibility Determination Report (Appendix J) to state agreement with the decision. If a member disagrees, he/she may write a separate statement stating the reason for the disagreement with the team.
Initial IEP Development

Once initial eligibility has been established, the district has 30 calendar days to develop an appropriate IEP. An IEP meeting must be scheduled (Appendix K: Parent/Guardian Notification of Conference) and the Psychologist provides written notice and a copy of the procedural safeguards in the parent's native language. It is the responsibility of the student's IEP team to evaluate the results of the eligibility assessment and determine what specially designed instruction the student requires based upon the evaluation results.

The public agency must ensure that the IEP Team for each child with a disability includes:

- the student’s Parent(s) (Appendix F: Parent/Guardian Notification of Conference)
- a regular education teacher who is, or may be responsible for implementing the IEP
- a special education teacher who is, or may be responsible for implementing the IEP
- a representative of the local school district
  - qualified to supervise specially designed instruction
  - knowledgeable about the general education curriculum
  - knowledgeable about the availability of resources and the authority to commit resources
- an individual who can interpret the evaluation results
- at the discretion of the Parent(s) or the district, other individuals with knowledge or special expertise regarding the student
- the student, when appropriate
- in the case of a student for whom transition services must be planned, a representative of any agency that may be providing or paying for transition services
- for a child age three to five years old not yet entered into primary grade the team shall include an individual qualified to teach preschool.
- a qualified bilingual specialist or bilingual teacher, if needed
- a representative of a State-operated or nonpublic facility, if it is anticipated that placement in a nonpublic facility will be considered

Excusal

A member of the IEP Team is not required to attend an IEP Team meeting, in whole or in part, if the parent of a child with a disability and the public agency agree, in writing, that the attendance of the member is not necessary because the member's area of the curriculum or related services is not being modified or discussed in the meeting.

A team member may be excused from part or all of a meeting when his/her curriculum area or related service is being modified or discussed, if parents, in writing, and the LEA consent to the excusal, and the member submis written input to the parents and the team prior to the meeting.

(Appendix L: Written Agreement to Excuse Team Member Attendance at IEP Meeting).
Types of IEP Meetings

Initial IEP

Step 1:
The Psychologist MUST send written notice and a copy of the procedural safeguards in the Parent's native language to parents informing them of the initial IEP meeting and the members attending.

Step 2:
Prior to the initial IEP meeting the special education case manager should develop (a) draft present levels of educational performance (PLEP) to be reviewed and potentially revised at the IEP meeting in the following areas:

Student strengths;

Parental concerns regarding their child's educational performance.

The results from the initial evaluation or previous evaluations;

If appropriate, the results of previous state and district assessments; and

For students 14 or older, the student's preferences, needs, interests, and post-secondary aspirations.

The above information should be gathered from a variety of sources including the parents, general education teachers, the student when appropriate, and others who may have direct knowledge of the student's strengths and needs.

The PLEP must define how the student's disability affects the child's performance and what involvement the student will have in the general curriculum. The initial IEP meeting is when goals, objectives, and the need for any related services are determined. It is acceptable and helpful for the special education case manager to bring suggested goals and objectives to the IEP meeting, but parental input is vital in the development of an initial IEP.

The main task at the initial IEP meeting is to review the evaluation data, develop an IEP based on the individual student’s identified disability(ies) and data collected. The IEP shall include the appropriate measurable goals and short-term to best meet the student's needs. This shall enable the student to be involved in and progress in the general education curriculum, to the greatest extent possible.

Step 3:
Once the PLEP has been reviewed and the team has given input, it is crucial to identify the impact of the student's disability on his/her educational performance in the regular educational setting. This will assist in identifying the specific, specially designed instruction the student will need to progress in the general curriculum.
Step 4:
The team must develop measurable goals and short-term objectives based upon the student's PLEP and the impact the student's disability has upon his/her learning.

a. The measurable goals must be written in such a way that data can be collected which shows whether or not the student is progressing toward the annual goal. This data must be sufficient to allow the IEP team to evaluate the effectiveness of the goal and the short-term objectives.

b. The short-term objectives must also be measurable and must be consistent with the best practices identified for the subject being taught. The short-term objectives, or short-term goals, should be designed as steps, which will assist the student in achieving the overall annual goal. (For example, Joey will read 40 words per minute by __as measured by; Joey will read 50 words per minute by __as measured by; etc.)

Step 5:
The team must determine the projected dates for the initiation of the services and the anticipated frequency, location and duration of the services.

NOTE: The Illinois State Board of Education requires that a special education child's parents be regularly informed of their child's progress on the IEP goals and objectives, at least as often as parents are informed of non-disabled children's progress. This notice must include specific data that demonstrates for the parents, in terms they can understand, what progress their child has made or not made on the IEP goals and objectives.

Step 6:
Related services, support services, and consultation services, or indirect services, should be implemented to help students a) advance appropriately toward attaining the annual goals, and (b) be involved and progress in the general curriculum and participate in extracurricular and other nonacademic activities.

Step 7:
The next step is to determine if any special factors exist that require additional assistance. These include behavior, the need for assistive technology, and language and vision issues. Also, to be considered is whether the student should or should not participate in general education classes and/or activities. Finally, extended school year (ESY) must be discussed and the need for transition services (defined in STEP 11 below) for student's who will reach the age of 14 during the IEP period. All of these areas are covered on one page and must be discussed by the team.

Step 8:
The team also must discuss and decide if the student will participate in district or statewide assessments and if so, what level of assessments would be appropriate and what accommodations, if any, the team considers appropriate. Accommodations may include such things as extended time for a student who demonstrates processing difficulties, having test items on an assessment
read to a student who has a reading disability, or having a student take a more appropriate benchmark test that more accurately reflects their ability level. Any or all of these may be considered when determining the extent of participation or accommodations that the team may feel are appropriate in testing.

Step 9:
For students who reach the age of 14 before or during the IEP period, a statement of transition service needs of the student in the appropriate areas must be written. The statement must focus on the student's future course of studies. It is the responsibility of the IEP team to determine what this transition plan should look like and may include career exploration, interest assessment, and/or specific courses of study designed to help the student prepare for further educational needs.

For students 14 (or younger if the IEP team determines a need) transition goals should include the areas mentioned above for students 14 and must also include a statement of interagency services the IEP determines to be appropriate to help create future success and planning for the student. Fundamentally, the purpose of the transition goals are to help the student on an IEP begin to develop an understanding and plan for their future needs not only in the world of work, but also their future educational and personal needs.

Step 12:
At least one year prior, or when the IEP team becomes aware that a student is about to reach the legal age of 18 (Appendix M: Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority), become legally emancipated, or is court ordered, the case manager must have documentation of the transfer of procedural rights. The transfer of procedural rights to the student must be documented on the IEP.

Step 13:
The team should discuss and define an appropriate setting for the student to receive the specially designed instruction that is identified in the IEP. This discussion should lead to a placement decision in the least restrictive environment in the District’s continuum of service. The parent must consent for initial placement. The placement can start in 10 calendar days or the parent can waive the 10 days and indicate that placement should begin as soon as possible (Appendix N: Parent/Guardian Consent for Initial Special Education Placement).

Step 14:
Finally, once an appropriate IEP has been developed and the team agrees on the content and the duration of the IEP, then the district requires signatures from the team members on the cover sheet to document participation in the meeting. The Parent must receive a copy of the completed IEP in its entirety at the conclusion of the IEP meeting. A copy of the parental rights document must be included with the copy of the IEP.

Step 15:
Each public agency must ensure that:

- The child’s IEP is accessible to each regular education teacher, special education teacher, related services provider, and any other service provider who is responsible for its implementation; and
• Each teacher and provider described in this provision is informed of his or her specific responsibilities related to implementing the child’s IEP and the specific accommodations, modifications, and supports that must be provided for the child in accordance with the IEP.

Annual IEP Review:

Each public agency must ensure that the IEP Team reviews the child’s IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved and revises the IEP, as appropriate, to address:

1. Any lack of expected progress toward the annual goals and in the general education curriculum, if appropriate;
2. The results of any reevaluation;
3. Information about the child provided to, or by, the parents, as described under IDEA;
   • the child’s anticipated needs; or
   • other matters.

Step 1:

Written notice and a copy of the procedural safeguards, in the parent’s native language, must be sent by the case manager to the Parent and an IEP meeting must be scheduled before the expiration date of the IEP.

NOTE: If there have been at least 3 documented attempts on 3 separate occasions to schedule an IEP meeting with the parent(s) and they either cannot make the meetings, or fail to attend, and have not requested an alternate date, then the team can proceed without the parent. Illinois Board of Education specifically note that “Sufficient attempts” means [parents have been communicated with directly to arrange a meeting and written notice has been sent which includes the parents right to request a change in the meeting date or time, and this occurs prior to the date of the annual review of the IEP].

Example of sufficient attempts:

Call Parents and arrange date (attempt 1)
Send Notice in mail (attempt 2)
Call Parent day of meeting and remind that meeting is scheduled (attempt 3)
Email Parents and confirm meeting date (attempt 1)
Send Notice in mail and notice comes back due to wrong address (attempt 2)
Send Notice with child (write on notice sent to home address but returned please update school system) (only second attempt because notice did not reach parents)
Email Parents with notice attachment and get confirmation from parent (attempt 3)
Step 2:
At the annual review of the IEP, it is necessary to evaluate the student's progress on the previous IEP before developing measurable goals and objectives for a new annual IEP. This examination should include a review of the data collected that outlines the student's progress on the measurable annual goals. The team should discuss the data and interpret how the student has progressed on the measurable goals and short-term objectives and if they have not, the team needs to consider this as new measurable goals and short-term objectives are developed.

Step 3:
For the purpose of revising an IEP, the steps identified above for the development on an initial IEP still apply. This includes identification of specially designed instruction, related services, placement, ESY consideration, age appropriate transition statements and documentation, etc.

NOTE: ISBE require that a special education child's parents be regularly informed of their child's progress on the IEP goals and objectives, at least as often as parents are informed of non-disabled children's progress. This notice must include specific data that demonstrates for the Parents in terms they can understand, what progress their child has made or not made on the IEP goals and objectives.

Step 4:
The IEP must be implemented within 10 days of development or revisions. However, Parents must receive a copy of the complete annual IEP and the case manager must make a documented effort to discuss the IEP with the parents if they are not in attendance.

Step 5:
Finally, the case manager must send a copy of the procedural safeguards in the Parents native language to the parent's notifying them that their student's IEP has been changed. This notice should include any information regarding modifications or changes made to the IEP including the amount of time specially designed instruction will be provided, any changes regarding related services, the addition of transition goals, etc. (Appendix O: Notification of Conference Recommendations & Appendix P: Parent/Guardian Notification of Change of Special Education Placement).

Step 6:
A Parent may request an IEP meeting at any time during the school year. The Case Manager must respond in writing within 10 days by complying with the request and setting a date or refusing the request and including a reason why no meeting is necessary to ensure the child is getting a free and appropriate education.

Reevaluation

Step 1:
An IEP meets to determine if any additional information is needed to reevaluate the student. The parent should be included in the meeting. A face-to-face meeting does not need to take place. The domain page can be explained to the Parent over the phone and sent home for a signature.
Step 2:
If the team determines that no additional data is needed to reestablish eligibility then the school Psychologist will get parental agreement to obtain no additional assessment data on the “Consent for Re-Evaluation form”

Step 3:
If the IEP team determines that additional data is needed for re-eligibility to be established and once the assessment areas for the reevaluation are identified, parental consent must be obtained by the school Psychologist. If a district cannot obtain parental consent within 10 days, the district may file due process.

Step 4:
Once the reevaluation is completed, or in the case of a team decision to obtain no new data, then written notice and a copy of the procedural safeguards in the parent's native language must be sent to the parent to convene a re-eligibility meeting. The student's IEP team can act as this re-eligibility team. The team needs to review any data obtained from a reevaluation, or previous data, and review the eligibility criteria.

Step 5:
If necessary, due to the results obtained from the reevaluation, the student's IEP team may need to review the IEP for possible modifications. If this becomes necessary written notice and a copy of the procedural safeguards in the parent’s native language must be sent outlining the intent to revisit the IEP and the nature of the recommended changes.

If the IEP is revisited and changes to the IEP are made, then the date of the meeting to revise the IEP becomes the new IEP anniversary date.

NOTE: These meetings can be combined as long as the process is followed within the meeting as outlined above.

**IEP Review/Revision - Amendments**

IEP amendments may take place in two different ways:

1. An IEP meeting may be conducted for significant changes (e.g. change in placement, change in behavior intervention plan)

2. The IEP team may agree not to hold a meeting for the purpose of making the changes and develop a written document (e.g. change in accommodations/modifications, change state testing) (Appendix Q: Parent Agreement to Amend/Modify Current IEP).

If the team chooses to use the written document, the parent must agree to the change and sign the amendment form. The parents must then receive a revised copy of the IEP with the amendments incorporated. The action of amending the IEP does not change the annual IEP meeting date.
Termination of Eligibility

The IEP team must evaluate a child with a disability in accordance with the Evaluation Procedures or with the Review of Existing Data and Evaluation Planning before determining that the child is no longer a child with a disability.

The evaluation described in the previous section is not required before the termination of a student's eligibility if: (a) Due to graduation with a regular high school diploma; or (b) For student's who are no longer eligible due to their age.

The Case Manager shall provide prior written notice when a team determines that a child is no longer eligible for special education.

Step 1:

A meeting must be scheduled with the Psychologist present to develop an appropriate evaluation for eligibility. This evaluation must include all measures necessary for an initial evaluation of the suspected disability. Prior written notice and a copy of the procedural safeguards must be sent to the parent regarding the evaluation-planning (domain) meeting in the parent’s native language. The student's IEP team, made up of the required members as described above, acts as the evaluation planning team.

Step 2:

The IEP team MUST review prior evaluation information and determine what, if any, additional information is needed to complete a thorough reevaluation of the student's eligibility.

Step 3:

Once the team has determined what, if any, additional data is needed, and then parental consent must be obtained by the Psychologist to complete any evaluation procedures.

Step 4:

Once the evaluation is complete, an eligibility termination meeting must be scheduled by the case manager and written notice and a copy of the procedural safeguards must be sent in the parent's native language. If at the eligibility termination meeting, the team determines that based upon the evaluation data available, the student no longer meets the initial eligibility criteria set forth by the Illinois State Board of Education, the team MUST find the student no longer eligible and complete the eligibility form accordingly.

Step 5: Finally, the case manager must send written notice (Appendix O: Notification of Conference Recommendations) to the parent(s) notifying them that their student no longer meets eligibility criteria and the intent of the school district to discontinue special education services.
Extended School Year

According to ISBE, extended school year services (ESY) are those services that the IEP team determines are necessary to maintain skills, not develop new ones. This means that in order to recommend a student for ESY services there must be documented evidence of significant loss of skills or behaviors in an area or areas in which the student is receiving specially designed instruction as a result of an interruption in the delivery of those services.

Step 1: At the initial IEP meeting, or at any annual review of the IEP, the IEP team must discuss the possible need for ESY services. This discussion must focus only on the services provided on the IEP and must be documented in the ESY section of the IEP.

Step 2: Before a recommendation for ESY services can be made there must be documented evidence that the student has demonstrated a significant loss of skills or behavior from prior interruptions of their special education services, or supportable, documented evidence or data to substantiate the IEP team's professional judgment that there would be a significant loss of skills or behavior where data does not exist.

This documented evidence must include, but is not limited to:

- Evidence or data that demonstrates that the very nature and severity of the child's disability alone justifies the need for ESY services;
- Evidence or data that demonstrates the child's rate of progress would be negatively affected by an interruption in services. This evidence or data must demonstrate the rate of progress over time and must specifically demonstrate what the negative effect from an interruption in services would be;
- Data or evidence that demonstrates alternative resources, other than ESY, does not exist to prevent a significant loss of skills or behavior;
- Evidence or data that demonstrates the child's ongoing need to interact with children without disabilities. This data or evidence must demonstrate how this need has improved the student's skills or behavior and how the interruption of this interaction would negatively affect the student's skills or behavior;
- Evidence or data that identify the impact of an interruption in services on areas of the child's curriculum, or specific IEP goals and objectives, that have demonstrated a significant need for continuous and ongoing attention. This data or evidence must be sufficient to demonstrate how the level of attention given to the student is significantly beyond what would be expected, the impact this attention has had on the student's progress or performance, and the effects an interruption in services would have on the student's progress or performance;
- Data or evidence that demonstrates the need for a continuation of services based upon the child's vocational needs and an IEP based program;
- Data or evidence that demonstrates that the nature of services requested is due to extraordinary need, or the ESY services are integral to the child's IEP program;
• Data or evidence that demonstrates emerging skills, or breakthrough opportunities, that are occurring. This data must demonstrate the emerging skills over time, must demonstrate that the emerging skills are crucial to the progress or performance of the student, and the data or evidence must also demonstrate how these emerging skills would be lost without extended school year services.

Step 3:

Once this data is gathered and the IEP team has reviewed the data and made a determination for ESY services the student's case manager must compile the data and complete the district's forms for a request for ESY services (Appendix R: ESY IEP).

Step 4:

The case manager must send information to the student's parent of the district's intent to provide ESY services and what services will be provided, dates and times the services will be provided, where the services will be provided, and that transportation will be provided for the student. This information will be sent to each case manager from the Division of Specialized Services.

A copy must be sent to the Division of Specialized Services.

Step 5:

After ESY services have been provided the data collected about maintenance of skills will be given to the student's building case manager and put into the student's cum folder.
Special Circumstances: Transfer, Private and Home Schooled Students

Children in Private Schools Enrolled by Their Parents

There are a number of very specific laws and rules regarding the district's process and responsibilities for eligible students in a private school setting.

Private Schools; Services Plan

The district will assure the process used to develop an Individual Service Plan (ISP) (Appendix S: Individual Service Plan) for a private school placed special education student is consistent with the process used to develop and review an IEP for a public school special education student.

Specifically, the district will assure that measurable goals and short-term objectives are discussed that address the child's needs resulting from the identified disability.

These goals and objectives should address not only ways for the student to benefit from the general curriculum, but also other educational needs as well.

However, only those goals and objectives that are related to the services the district has identified as being offered to parentally placed private school children should be written into the ISP.

The district is not obligated to provide transportation from the child's home to the child's private school.

However, the district is obligated to provide transportation if transportation is necessary for the child to benefit from or participate in the services provided by the district.

This transportation must be provided:

a. From the child's school or home to a site other than the private school and;

b. From the service site to the child's private school or home depending upon the timing of the services.

Annual ISP Review

Step 1:

The case manager providing services will assure that written notice and a copy of the procedural safeguards in the parent’s native language is sent to the parent of a private school student and an ISP meeting is scheduled prior to the date of the annual review of the ISP.

NOTE: Consistent with the process followed with a public school IEP, if there have been documented attempts to schedule an ISP meeting with the parent and they either cannot make the meetings, or fail to show, then the team can proceed without the parent. The State specifically note that "Sufficient attempts" means [parents have been communicated with directly to arrange a meeting and written notice has been sent which includes the parents right to request a change in the meeting date or time, and this occurs prior to the date of the annual review of the ISP.
Step 2:
At the annual review of the ISP it is only necessary to evaluate the student's progress on the services being offered by the district before developing measurable goals and objectives for a new annual ISP. The team should discuss the data and interpret how the student has progressed on the measurable goals and short-term objectives or develop new goals and objectives based on student’s needs and services offered by the district based on the timely and meaningful meeting service plan.

Step 3:
The ISP may be implemented immediately regardless of whether parents have signed the revised ISP as long as the prior notice steps have been followed. However, parents must receive a copy of the complete annual ISP immediately following the meeting.

Step 4:
Finally, written notice and a copy of the procedural safeguards in the parents native language must be sent to the parent's notifying them that their student's ISP has been changed. This notice should include any information regarding modifications or changes made to the ISP.

Therefore, the district will assure that:

- Parents and appropriate teachers are consulted and allowed input into the development of an IEP or ISP and the services to be provided.
- The district will assure that the services identified on an IEP or ISP are provided according to the State outlining services to private school students Public Agency Responsibility for Private School Children with Disabilities and Limitation on Services

IDEA defines the legal rights of a private school student to publicly funded special education services. Specifically, a private school student does not have the same legal rights to special education services as a special education student in a public school.

A parent of a privately placed student has a right to make a formal complaint to the Illinois State Board of Education.

However, the district must follow the same process it does for public school special education students when:

The district is considering a referral for evaluation of a private school student;

- Determining possible eligibility for special education services;
- In developing an appropriate ISP. Following the same process regarding written notice to parents of public school special education students when providing written notification to parents of a private school student regarding evaluation consideration or planning, eligibility determination, and ISP development or review;
- Following the same process for the development and review of an ISP for a private school student as the district does for the development and review of an IEP for a public school special education student.
- Consulting with a private school student's private school teachers when developing or reviewing an ISP.
Consultation with Representatives of Private School Children with Disabilities

The case manager is required to invite and include a private school student's private school teachers on the special education team consistent with the involvement of teachers in the public school setting. This includes meetings to discuss eligibility or the ISP.

The district will invite and consult with the private school teachers of a private school special education student in all meetings related to special education services in a timely manner.

After consulting with the parents and teachers of a private school student, the district personnel make the final decision regarding the provision of special education services.

The district does not use private school personnel to provide any special education services. The district assigns public school personnel to provide services in a public facility.

If an eligible private school child is receiving special education services at the private school and the child is partially enrolled (at least one 40 minute academic period per day) in the district. The student can receive a Free and Appropriate Education.

- Identify the student's present level of educational performance in relation to the area of disability.

- Identify the specific services that will be offered to the student and where those services will be administered.

- Identify the method of testing or measuring the progress of the student in the areas they are being served.

- Ensure the student FAPE and has the same access to programs and is allowed to participate to the same extent as non-disabled children.

Note: The district is tracking students being served on ISPs and who are dually enrolled by our FACTs data.

Assessment and Parental Notification Requirements

The level of responsibility the district has for providing special education services to eligible home schooled students depends on whether a special education team determines that services should be provided or not.

If a home schooled student is suspected of having a disability, or a Parent requests an evaluation. The child's neighborhood school will be responsible for acting as the evaluation/IEP team.

The Psychologist will assure that the process used to determine special education eligibility and the possible delivery of IEP services followed for a home schooled student is identical to that for a public school student regarding:

- Written notice of the district's intent to evaluate for special education eligibility or not and why and parents receiving a copy of the procedural safeguards;
• Obtaining parental written permission to complete a special education evaluation, place the child in special education, and develop an appropriate IEP;

• Providing written notice and a copy of the procedural safeguards in the Parents native language to a home schooled child's parents for the scheduling of the planning meeting to develop an individualized evaluation, the meeting to determine special education eligibility, and the meeting to develop an appropriate IEP;

• Developing an appropriate plan to measure "satisfactory educational progress" of the home schooled child;

• Reevaluating the special education eligibility of a home schooled child every three years.

The Psychologist will send written notice to the parents of a home schooled child stating the district stands ready to serve a home schooled child and have no further legal obligation regarding special education if:

• The Parent of a home schooled child refuses to give written permission for a special education evaluation, revokes permission, refuses to make the child available for an evaluation, refuses to respond or attend a meeting to consider placement into special education;

• A home schooled child is identified as eligible for special education services,

• Home schooled children are eligible for an ISP based on the agreement developed with the District and the home schooled Parents and parentally placed private students.

• IEP Responsibilities and Requirements

If an eligible home schooled child is receiving special education services at home, or a home schooled child is partially enrolled (at least one 40 minute academic period per day) in a public school and receiving special education services in conjunction with being home schooled, the district will assure that the IEP team will:

• Identify the student's present level of educational performance in relation to the area of disability.

• Identify the specific services that will be offered to the student and where those services will be administered.

• Identify the method of testing or measuring the progress of the student in the areas they are being served.

• Ensure the student FAPE and has the same access to programs and is allowed to participate to the same extent as non-disabled children.
Chart 4a: Eligibility Determination Flow Chart

Provide written notice with 10 days Notice of Procedural Safeguards in Native Language

Consider Exclusionary Factors

Consider Eligibility criteria for disability categories

Eligible under IDEA
- Develop the IEP at same meeting or within 30 days of evaluation

Not Eligible under IDEA
- Provide Resources within school district to parent and possible strategies
Chart a1: Tiered Service Delivery Model and Eligibility for Specific Learning Disability

Tier 1 Core Curriculum Instruction

Whole School Screening with Curriculum Based Measures

≥ 80% of Students are Grade-Level Learners

≈ 20% are Struggling Learners

Diagnostic Assessment

Tier 1 and Tier 2 Instructions

≈ 75% meet grade-level benchmarks

≈ 25% continue to struggle

Add 3 Tier Intervention

Ongoing weekly progress monitoring

Progress not adequate

Referral to Special Education

Determine if additional data is needed

Report student progress over time and results of interventions compared to peers

Consider Exclusionary Factors (i.e., lack of appropriate instruction, language)

Determine if student is eligible for special education services under specific learning disability
Chart 4b: IEP Process Flow Chart

Before the Meeting
- Send Notice of conference and Procedural safeguards in parent's native language at least 10 days prior to IEP meeting.
- Verify date/time with parent/guardian to ensure attendance.
- Encourage student participation especially for students 14 and over.

During the Meeting
- Introductions
- Welcome parent/guardian and provide copies of their rights.
- Identify purpose of meeting.
- Review the present levels of performance.
- Review current services.
- Parent/guardian questions or comments.
- Review progress, goals and objectives.
- Identify student’s educational needs and new goals.
- Discuss accommodations and modifications.

End of Meeting
- Review changes to IEP.
- Thank participants.
Chart 4c: 3 Year Reevaluation

Parent invited to evaluation planning meeting (Domains) and given a 10 day notification.

Determine if additional assessment data is needed.

If no further data is needed, provide written notice and procedural safeguards to parent/guardian.

If additional assessments are required, obtain parental requests within ten days or District can file for due process.

Convene eligibility meeting and review previous data within 60 school days.

Once assessments are completed, convene meeting and review data within 60 school days.

Convene IEP meeting and make necessary changes based on reevaluation results within 30 days of completion of testing.
Chart 4d: Eligibility Termination (Exiting)

1. Provide Procedural Safeguards and written consent.
2. Evaluation Planning Team must complete domain page.
3. Determine if additional assessments are necessary.
   - If yes, state assessments.
   - Obtain parent consent within 10 days.
   - Convene eligibility conference.
   - Send written notice stating student is no longer eligible for services.
4. If no, write why no additional data is needed.
Chart 4e: Parentally Placed Private School Student with Waukegan Attendance Area Home School Student
District Holds Timely and Meaningful Consultation.

District Develops Service Plan.

Students needing evaluation register with student support.

Team determines if student is eligible for special education services.

If student is eligible and resident of Washoe, student can dually enroll.

Must enroll for at least one 40 minute academic period per day.

The team develops a full IEP.

If a student is receiving TAPE, the student must receive all special education services stated on the IEP.

If student is eligible and Quality of Individual Service Plan (based on agreement between District and private schools under proportionate share).

Team Develops Individual Service Plan.

Special education recommendations and services.

Programs available within District 60.

Goals and objectives...
Excent Tera

Computer Requirements

Here are the basic requirements needed to operate Excent Tera (the electronic IEP System).

Note: These requirements are subject to change.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Minimum Requirements</th>
<th>Browser(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macintosh</td>
<td>* 8.x-9.x</td>
<td>* Safari</td>
</tr>
<tr>
<td></td>
<td>* X (recommended)</td>
<td>* Firefox</td>
</tr>
<tr>
<td></td>
<td></td>
<td>* Netscape</td>
</tr>
<tr>
<td></td>
<td></td>
<td>* Internet Explorer</td>
</tr>
<tr>
<td>Windows</td>
<td>* 95, 98, NT, 2000, 2003</td>
<td>* Internet Explorer</td>
</tr>
<tr>
<td></td>
<td>* Vista/XP (recommended)</td>
<td>* Firefox</td>
</tr>
<tr>
<td>Unix &amp; Others</td>
<td>Will work but not supported. (See <a href="http://www.citrix.com">http://www.citrix.com</a> for details.)</td>
<td>* Internet Explorer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>* Firefox</td>
</tr>
<tr>
<td></td>
<td></td>
<td>* Netscape</td>
</tr>
</tbody>
</table>

Internet speed: 56K. (DSL or better recommended).

Installation

All of the installation manuals are on the Excent Tera (IEP, Ghost) Website located at [http://ghost.waukeganschools.org/index2.html](http://ghost.waukeganschools.org/index2.html).

Once there,

![Image of Waukegan Public Schools Special Education Department]

Click on “Downloads”
Logging In

1. Open your web browser, and go to the Inside Edition at https://intra.wps60.org/login.html

2. Once you log in, find the LINKS in the middle of the page:

   To access Excent Tera click the Excent Tera button. This will take you to https://ghost.waukeganschools.org/Citrix/AccessPlatform/auth/login.aspx (the Excent Tera login Website). - You may want to bookmark this page -
3. Excent Tera Website. This site contains login and important information about Excent Tera.

![Excent Tera Website](image)

Note: Notice on the right side of the screen there is a Welcome, and Message Center. The Message Center provides information about Excent Tera Maintenance and Troubleshooting.

4. Login to Excent Tera: Enter your user name and password then click Log In: Note: Enter your Waukegan e-mail address without the “@wps60.org”.

![Login to Excent Tera](image)

5. Click on the TERA (Excent Tera) icon:

![Click on the TERA icon](image)

Teacher  Administration, Medicaid, & Related Service

6. Your computer will now connect to Excent Tera. You will see the following screens pop up and disappear (If you do not or you get an error, try the troubleshooting section on the Ghost (IEP) Website):
7. You will see the Excent Tera Login Screen:

![Teacher Version](image1)

![Administrator Version](image2)

8. Change your school by using the black down arrow and selecting the school. Enter your User ID (3-letter ID) or select your name using the black down arrow. Enter your password then click log in.

9. If your Reminder Screen is visible, click Home to go to the Student Explorer.

![Home](image3)

10. Student Explorer Screen.
Navigation

Where do I find help about navigating the system?

The best place to go to find information about navigating through the system is by going to the 'Help' menu bar in Excent Tera. Excent Tera has a dynamic help system. This means that it will pull up help information based upon where you are in the system and what you are trying to do. You can also search the help system for a specific topic.

Creating and Editing Documents

1. Highlight (choose) a student in the Student Explorer.
2. Click Documents->Explorer in the menu bar.
3. Highlight (choose) a document.
4. Pick the document from the “List of Student Documents” at the right, and click edit.

<table>
<thead>
<tr>
<th>List of student documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created By</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Was, Janet</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Frichtl, Joseph</td>
</tr>
<tr>
<td>Was, Janet</td>
</tr>
</tbody>
</table>

If it does not exist then you can create a new document by clicking on new.

**Filling out the documents**

Double-click on the blue hyper links (Memo) to enter text. Do **NOT** type directly on the document.

**Spell Checker**

Excent Tera has a built in spell checker. It automatically spell checks for you. Any questionable words are underlined in red. To fix them, right-click on the word and a menu will pop up with some suggested words.
Getting Started

This is a list of suggestions to do before you begin adding forms to a student's record. This will make the process go more smoothly.

Excent Tera has many automatic functions. One of them is the auto population of student names, address, etc. when forms are created and updated. If you do the following tasks first, the system will help you populate these types of fields.

- Verify your caseload.
- Check & update student contacts.
- Check & update student demographics.
- Setup student team members.
- Start the Parent Notification of Conference.
- Start an IEP Document.
Verify Your Caseload

Verify your caseload.

Are all your students listed in the Student Explorer?

Yes

No

1. Clear the filter.
2. Look under “exited students.”
3. Contact your Specialist and/or Coordinator.

Done. Go to Check & Update student contacts.
Check & Update Student Contacts

Check & update student contacts.

Has the contact information changed?

Yes

Notify the building secretary, as it must be changed in CIMS after the district verification process has been completed.

No

Done. Go to check & update student demographics.
Check & Update Student Contacts

It is essential to update all of the student contacts in TERA. Any person, who is not a TERA user that will be a part of the IEP team, needs to be added as a student contact.

1. From the Student Explorer Screen, click on the Contacts button.

A new screen will be visible.

The student’s parent(s) will automatically become a student contact. However, the case-manager must update and check this information for accuracy.

2. To **EDIT** a contact: Highlight the person’s name and click . The Contact information located at the bottom of the screen, can now be edited.

Edit the information for accuracy. Make sure a prefix is added for each contact so it will appear on the invitation. To edit information, click in a box and type in new information or use the down arrow and select the information.
3. Click on the tab: Address and Phones. Update information.

4. Click on the tab: Notes. If any other contact information is needed type it here.

5. Once all of the contact information has been entered click Save.

To **ADD** a contact: From the student contact screen make sure no current contacts are highlighted, then click Add. Add the information in the same manner as when the case-manager would edit a student. Then click save and it will add the contact.

**Check & Update Student Demographics**

It is essential to update all information under the student demographics. If this step is not done correctly the student information will not auto-fill into documents correctly.

**Teacher Version**

1. Login to Excent Tera and go to the Student Explorer Screen, by clicking on Home. This will take you to your caseload.
2. Highlight a student’s name and click on the demographics icon:

The demographic area for Teachers has 3 pages:

Demographic Information for Twenty Bird

This page should have all the information that is carried over through the District’s Student Data System (SDS). Please note: The Language data from the SDS does not always match the language
data from the IEP. The information on the bottom two sections that are highlighted in blue comes from SDS. The primary disability needs to be filled in by the case manager:

<table>
<thead>
<tr>
<th>Student disability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Disability</td>
</tr>
</tbody>
</table>

Click on the arrow. Double click on the correct Disability Code. Do the same if there are secondary or tertiary disabilities as well in the appropriate slots.

<table>
<thead>
<tr>
<th>Secondary Disability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Learning Disability</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tertiary Disability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

The second page of the Demographics also has three sections. Click on the Page 2 icon:

<table>
<thead>
<tr>
<th>Demographics - Page 2</th>
</tr>
</thead>
</table>

In the top section, the Home District, Home & Enrolled School as well as grade should also transfer from SDS.
In the second section, all five areas need to be filled in.

<table>
<thead>
<tr>
<th>Service category, funding, and placement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Category</td>
</tr>
<tr>
<td>Eligibility/Funding</td>
</tr>
<tr>
<td>Ed. Environment</td>
</tr>
<tr>
<td>Placement Date</td>
</tr>
<tr>
<td>Placement Status</td>
</tr>
<tr>
<td>Start and exit date</td>
</tr>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td>Exit from Special Ed</td>
</tr>
<tr>
<td>Exit Reason</td>
</tr>
</tbody>
</table>
Step One:
Service Category DEMO ▼
Click on the arrow at end of Service Category drop down ▼. Double click on the correct category.

Step Two: Click on the arrow at end of Eligibility/Funding. Choose the correct code.
Eligibility/Funding IDEA Child Count ▼

Step Three:
Ed. Environment ▼
Choose the correct code.

Step Four:
Placement Date ▼
Click on this icon to get the calendar, choose the correct date and double click.

SHORT CUTS: If you click on the name of the month, a scroll bar will appear to choose a different month. If you click on the year, you will get an arrow scroll bar to go to the correct year.

Of course, you can always just type in the date using mm/dd/yyyy format

Step Five:
Placement Status ▼
Choose the correct code.

Finally, the third demographics page: Fill in all appropriate dates. Make sure that the dates are updated following annual review and evaluation dates have occurred.
The instructional minutes should auto fill based on home school. However, if the student is only attending part of the day, these minutes need to be altered manually.

Administrator Version

Initial “home” page looks like this:

Highlight the student:
Click on the demographics button on the side bar:

Demographics screen has three sections:

The first page is labeled with the student’s name: **Bird, Tweety**

<table>
<thead>
<tr>
<th>ID Number</th>
<th>SS #</th>
<th>Central File #</th>
<th>Birth Name</th>
<th>First Name</th>
<th>Middle Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>345</td>
<td>876</td>
<td>Bird</td>
<td>Tweety</td>
<td></td>
</tr>
<tr>
<td>DOB</td>
<td>1/2/2002</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The format is different between the administrator access and teacher access, but the needed information is the same. On this first page, the following need to be filled out with the appropriate drop downs (same instructions as for teacher):

- **Service Category**: DEMO
- **Primary Disability**: Intellectual Disability
- **Eligibility/Funding**: IDEA Child Count
- **Education Environment**: IDEA
- **Placement Date**: 7/7
- **Grade**:
- **Parent’s Name**:

The second page is labeled **District/School**; again, the instructions to fill the following sections are the same as in the teacher section:
The other drop downs should auto-fill from SDS.

The third page: needs the following filled out:

- Placement Status
- English Ability
- Custody
- Secondary Disability
- Tertiary Disability
- Residential Status
- Term
- Relational Status

The exception at this point is this drop down: English Ability as it currently isn’t filled.

**Setup Student Team Members**

Setting up student team members allows the case-manager to identify each meeting participant. **This information will not automatically fill into documents unless team members are set up first.**

1. Click on the Teams button:
A new screen will be visible:

![Student Team Members](image)

2. Step 3: To edit, add, or remove team members for a student, highlight the student then click on **Edit**.

This screen will appear on the left side of the screen:

![Available Team Members](image)

The top of the screen lists all of the TERA Users. You can change the Team Members by clicking on **Add default members to the Team** button. This will auto-fill many of the IEP Team Members for you. You can also change the available team members by clicking on the black down arrow. Highlight the team member and click the blue down arrow.
moves the team member to the screen below. To remove a team member, highlight them in the below screen and click the blue up arrow:

**Note:** If you use the **Add default members to the Team** button, you will have to check the default list for accuracy and add or delete team members needed for that student.

3. To list the student as a team member, click on the black down arrow next to **USERS** and change it to “Student.” Highlight the student and click the blue down arrow:

<table>
<thead>
<tr>
<th>Available Team Members</th>
<th>Add default</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Rogers, Shaggy</td>
<td></td>
</tr>
<tr>
<td>Role/Position</td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td></td>
</tr>
</tbody>
</table>

4. To list the contacts as a team member, click on the black down arrow next to “Student” and change it to **CONT “Contacts.”** Highlight the contacts and click the blue down arrow:

<table>
<thead>
<tr>
<th>Available Team Members</th>
<th>Add default</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contacts</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Role/Position</td>
<td></td>
</tr>
</tbody>
</table>

5. Once all of the Team members are listed, click **Save**

<table>
<thead>
<tr>
<th>Team Members for Shaggy Rogers</th>
<th>Role/Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Access, Nurse</td>
<td>Nurse</td>
</tr>
<tr>
<td>Access, Teacher</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Rogers, Sally</td>
<td>Parent</td>
</tr>
<tr>
<td>Rogers, Shaggy</td>
<td>Student</td>
</tr>
<tr>
<td>Was, Janet</td>
<td>Special Education Lead Teacher</td>
</tr>
</tbody>
</table>
Start the Parent Notification of Conference

The Parent/Guardian Notification of Conference form informs the parent(s)/guardian(s) of the date, time, and location of the conference to discuss the educational needs of their child, the purpose of that conference, and those persons who have been invited to attend.

The form must be dated and mailed in at least 10 calendar days prior to the scheduled conference. The parent may agree to waive the 10-calendar day requirement.

PARTICIPANTS:

- Please insert the names and titles of all individuals who will be invited to the IEP meeting for the purpose identified on the Notification of Conference form.
- Please list all required personnel including students age 14 ½ and older when addressing needed transition services.

In order for Excent Tera to auto-fill the IEP participants, on the first page of the IEP, the Parent Notification of Conference needs to be done BEFORE the IEP is started. The student’s case manager completes the Parent Notification of Conference form.

2. Once you have opened the new document, fill in the conference date, time, and location. In addition, please review the Parent/Guardian name to verify if it is correct. If the Parent/Guardian name does not auto-fill, click on the Name link and select the correct Parent/Guardian name.

PARENT/GUARDIAN NOTIFICATION OF CONFERENCE

Student Name: Tricia Bird  DOB: 12/22/92  Student Id: 2019

Date: 02/12/03

Dear Yvonne Sneed

(Parent/Guardian Name)

In order to discuss the educational needs of your child, you are invited to attend an IEP conference meeting to be held:

Date: 05/12/03  Time: 9:00am  Location: Lincoln Center

You are a participant on the IEP Team, which will meet to address the purpose as indicated in the next section. You have the right to bring other individuals who have knowledge or special expertise regarding your child. If you plan to bring other individuals, please notify the individual indicated below prior to the meeting so arrangements and accommodations for participants can be made. If these meeting arrangements are not agreeable and/or you require an interpreter or translator, please contact the individual indicated below.

The purpose of this conference is to:

☐ Review your child’s educational status and determine what additional data, if any, are needed to complete your child’s evaluation.
☐ Review your child’s recent evaluation to determine, reconsider, or change your child’s eligibility for special education and related services.
☐ Review your child’s eligibility and needs for special education and related services.
☐ Review and/or develop your child’s Individualized Education Program (IEP) and determine the child’s educational placement.
☐ Consider post-secondary goals and transition services (beginning at age 14 1/2).
☐ Consider relationships of disability to disciplinary code violation(s).
☐ Consider the need for a functional behavioral assessment for your child.
☐ Review a need to create or revise a behavior intervention plan for your child.
☐ Review your child’s recent change of placement due to suspension.
☐ Determine the location of the interim alternative educational setting.
☐ Review anticipated date of graduation.
☐ Other: Text

The invited individuals and their titles are listed below. If one of the individuals listed below is unable to attend due to unforeseen circumstances, the district will designate an appropriate and suitable replacement to attend the IEP meeting. Any student, age 14 1/2 and older must be invited to any meeting if the purpose of the meeting is to consider transition service needs.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jose Lara</td>
<td>Principal</td>
</tr>
</tbody>
</table>

3. Next, you must select the purpose of the IEP conference. Double click on the box to place a “check mark” in the box.

4. The next step is to place the IEP team participants on the conference form. Double Click on the “Down Arrow” to add Name and Title links. Double Click once for each participant to invite to the meeting. Click on the Name link to add IEP participants.
5. If the participant’s name is not in the Participant List, you can type in their name and title manually where it says, “Name” and “Position/Role” under New Value.

6. Under the next section that discusses the Procedural Rights and Safeguards, please place the name and telephone number of the student’s case manager.

You and your child have protection under the procedural safeguards of special education regulations. The school district must provide you a copy of *Explanation of Procedural Safeguards* once a year. Please contact the district if you need a copy of *Explanation of Procedural Safeguards*.

Name: Christina Connolly  
Title: Psychology Coordinator  
Phone: (343) 269-5530 Ext
7. Then, place the name of the person who created and filled out the Notification of Conference form in the last Name link. Please remember to sign your name under “Sincerely”!

Sincerely,

Name: ____________________________  Title: ____________________________

<table>
<thead>
<tr>
<th>Name:</th>
<th>Christina Conolly Wilson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:</td>
<td>Psychology Coordinator</td>
</tr>
</tbody>
</table>
Documents

Form Hierarchy

- Behavior
  - Functional Behavioral Assessment:
  - Behavioral Intervention Plan:
  - Manifestation Determination

- Supplemental Documents
  - Scheduled Courses:
  - Parent Consent for Billing Public Insurance:
  - Child Find Data Sheet:
  - Coordinator's Data:

- Evaluation
  - Child Outcomes Rating and Summary Forms
  - Determination of Speech or Language Impairment
  - Determination of Autism
  - Determination of Cognitive Disability
  - Determination of Deaf/Blindness
  - Determination of Deafness
  - Determination of Developmental Delay
  - Determination of Emotional Disability
  - Determination of Hearing Impairment
  - Determination of Multiple Disabilities
  - Determination of Orthopedic Impairment
  - Determination of Other Health Impairment
  - Determination of Visual Impairment
  - Documentation of Evaluation Results
  - Eligibility Determination - Other than SLD
  - Documentation of Intervention/Evaluation Result:
  - Eligibility Determination
  - Preschool Summary Form

- Placement (IEP)
  - Autism Considerations
  - Individualized Education Program
  - Service Plan
Behavior

Manifestation Determination

A manifestation determination review is conducted by the individualized education program team and other qualified personnel in a meeting. In carrying out the review, the individualized education program team and other qualified personnel determine that the behavior of the child was not a manifestation of the child’s disability only after first considering, in terms of the behavior subject to disciplinary action, all relevant information, using the Tera form.

The top of the form, including known disability, will auto-fill from Tera demographics:

Double click on the Date to pull up the to put in the date of the meeting.

The next area is the incident portion:

Double click on the Incidents to get the following drop down:

If you double click on the incident on the top half, it will drop down to the bottom half:
You can choose as many as are appropriate. If the code isn’t shown, you can type the incident on the bottom as well. Once all incidents have been identified, click on the OK.

The next three sections are:
The Student’s IEP, and Placement (include a review of all relevant information in the child’s file, including the child’s IEP)

Observation of the Student (include a review of staff observation regarding the student’s behavior)

Information provided by the Parents (include a review of any relevant information provided by the parent(s))

Each section has a memo box for including all relevant information. The first memo box should be used to review the student’s IEP, goals, accommodations, and any FBA or BIP information already established. The second memo box is for the review of all observations regarding the student’s behavior, and the third memo box is for parental input.

Following a discussion of all of the above, the bottom half of the Manifestation form needs to be addressed:

Based upon above information, the team has determined that:

- Yes □ No □ The conduct was caused by or had a direct and substantial relationship to the student’s disability.
- Yes □ No □ The conduct was the direct result of the school district’s failure to implement the IEP.

Double click on the appropriate □ to answer Yes or No for each statement.

Finally, if the answer was YES to either statement, you need to check the appropriate □ to indicate whether or not the behavior was a manifestation of the student’s disability.

If “Yes” to either above, the behavior must be considered a manifestation of the student’s disability.

Check the appropriate box:

- Yes □ The student’s behavior WAS NOT a manifestation of her/his disability. The relevant disciplinary procedures applicable to students without disabilities may be applied to the student in the same manner in which they are applied to students without disabilities. If the district initiates disciplinary procedures applicable to all students, the district shall ensure that the special education and disciplinary records of the student with a disability are transmitted for consideration by the person or persons making the final determination regarding the disciplinary action.

- Yes □ The student’s behavior WAS a manifestation of her/his disability. The team must review and revise the student’s IEP as appropriate and the district must take appropriate action. A functional behavior analysis will or has been completed. The behavior intervention plan shall be completed or modified/updated as required to address behavior.

**REMINDER:** BIP & FBA documents are listed under behavior for the legacy documents ONLY, if you are creating new, they should be opened from the Supplemental Documents area in TERA.
Supplemental Documents

Scheduled Courses
This form is used at the middle and high school levels to track which courses a special education student is taking. On the top portion of the form, the Student’s Name, Date of Conference, CIMS, CF# and DOB will auto fill:

You will need to double click on the ▼ at the end of the to open enough lines to fill in the classes. Double click on each Year to get ▼, fill in the appropriate school year. Then double click on each Semester to get ▼ and fill in whether it’s the first or second semester. Finally, click on each Class and this drop down menu ▼ will appear. Double click on the appropriate class at the top, it will drop down to the bottom half ▼ and then click OK.

Parent Consent for Billing Public Insurance

The parent consent to bill Medicaid form is included in the documents in TERA. This form is to be completed by the parent or legal guardian at the time of the IEP signing. It is very important
that the signed consent be sent to Medicaid for audit filing. This is an annual form so each year a new form needs to be completed and sent to Medicaid, as it effects the reimbursement from the state for the services provided within the IEP. Feel free to contact the Medicaid office with any questions.

On the top portion of the form, the Student’s Name, CIMS and CF# will auto fill:

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Grade Level</th>
<th>CIMS: 8526</th>
<th>CF#: 1234</th>
</tr>
</thead>
</table>

Washaknee Public Schools
Community Unit School District 40
1201 S. Main St.
Washington, IL. 61571

PARENT CONSENT FOR BILLING PUBLIC INSURANCE (Medicaid)

Medical reimbursement is a source of Federal Funds approved by Congress to help school districts maintain and improve Special Education Services.

The above named school district has permission to release information from my child's education record (IEP) regarding special education services my child receives, noted below, to the Illinois Department of Public Aid for purposes of verifying Medicaid reimbursement. I understand that except for filing claims for public insurance (Medicaid) reimbursement, the LEA (school district) will not release these or any other records to any other agency or person without my further written consent, or as otherwise authorized by law, and the individual entitled to whom the information is being released may not release the information without my written consent or other legal authority.

I further understand that I may deny consent for the school system to access my child's Medicaid coverage to seek reimbursement for the health-related services provided and that any exercise of this right will not affect the delivery of those services to my child, or my rights to sue. I understand that my permission is voluntary and may be revoked at anytime. My withdrawal of consent will be honored from the date of the notice, except for actions taken before my written withdrawal of consent and will not affect Medicaid billing submitted prior to the date of receipt of the withdrawal. I also understand that I have the right to review or request a copy of the records disclosed or challenged, the records accuracy, relevance or propriety in accordance with Section 577 of the Illinois School Student Records Act.

The information that may be released by IEP includes:
- My child's identifying information (name, address, IEP number)
- My child's Date of Birth

In order to add services, you must first click on the arrow to add a line:

<table>
<thead>
<tr>
<th>Service</th>
<th>Min.</th>
<th>Amount of Service</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
</table>

Click on to get the following window:

From the Service arrow, choose the appropriate service, and fill in the Start Date and End Date for the current IEP.
Next, click on the “0” in the Minutes section to get the following window to fill in the amount of time:

Then click on the “Amount:

In the large white box, you can fill in the minutes per month.

The Start and End Dates will fill in from the first service window link

The student’s name, address and date of birth will also auto fill at the bottom of the page:

Student's Last Name: Doe
Student's First Name: Scooter
Student's Address: 1234 Mystery Lane, Waukegan, IL 60085
Date of Birth: 02/26/82
LEA Name

You will need to click on the to get this window:

Highlight the correct name and then hit enter.

Finally, at the bottom of the page, the parent checks either the I consent or I do NOT consent box, sign and date.
This consent is in effect from date of signature until a subsequent Annual Review is completed, there is a change in the noted services to be provided to my child, or I provide written withdrawal of consent to my child's case manager, school principal, or the Director of Special Education Services, which ever comes first.

☐ I consent
☐ I do NOT consent

Signature of Parent/Guardian: ___________________________ Date: ___________________________

Functional Behavior Assessment

Click ‘Document’ to access ‘Supplemental Document’.

Click this icon next to ‘Supplemental Documents” which will bring up the following documents:

- Functional Behavioral Assessment:
- Behavioral Intervention Plan:
- Child Find Data Sheet:
- Coordinator's Data:

Double click ‘Functional Behavioral Assessment’. It depends on whether you are opening a new document or modifying the existing document.

Click either one of the 2 icons to either open a new FBA or edit the exiting FBA document.
To add participant names, click ↓ to add new lines for names. Make sure to click
[Save] before exiting the document.

**Behavior Implementation Plan**

For students whose behavior impedes their learning or the learning of others, the IEP team must consider the implementation of positive behavior strategies and interventions. This may include a formal behavior intervention plan.

Student’s Name and Date of Birth will auto fill on the top of the form:
Double click on the **Date** link for to fill in the date of the meeting.
The first section deals with listing the student’s strengths, which can be pasted from the FBA, double click on the **Memo** to fill in the information.

**Student’s Strengths** - Describe student’s behavioral strengths (Import from Complex FBA) **Memo** «

Then click on the correct □ to indicate whether the problem behavior is a skill or performance deficit.

- **Skill Deficit**: The student does not know how to perform the desired behavior.
- **Performance Deficit**: The student knows how to perform the desired behavior, but does not consistently do so.

Next, double click on the **Memo** in each of the three sections below to fill in the appropriate information.

**Hypothesis of Behavioral Function** - Include hypothesis developed through the Functional Behavioral Assessment. What desired thing(s) is the student trying to get? OR What undesired thing(s) is the student trying to avoid? **Memo** «

**Summary of Previous Interventions Attempted** - Describe any environmental changes made, evaluation conducted, instructional strategy or curriculum changes made or replacement behaviors taught. (Refer to IEP and Simple BIP) **Memo** «

**Replacement Behaviors** - Describe which new behaviors or skills will be taught to meet the identified function of the problem behavior (e.g. student will slap his desk to replace striking out at others). Include description of how these behaviors/skills will be taught. **Memo** «

Then click on each □ that applies, using the **Memo** box to describe the intervention.

**Interventions to Promote Replacement Behavior and Prevent Target Behavior (Choose all that apply):**

- Classroom environment arrangements (describe): **Memo** «
- Teachers/Instructional strategies (describe): **Memo** «
- Academic/Curricular modifications (describe): **Memo** «
- Skills to be taught to the student (if identified as lacking):
  - Academic (describe): **Memo** «
  - Behavioral/social/emotional (describe): **Memo** «
  - Communicative (describe): **Memo** «
  - Sensory motor (describe): **Memo** «

- Peer Strategies (describe): **Memo** «
- Home/School correspondence strategies (describe): **Memo** «
The final step on this first page is to fill in the Memo boxes in each of three sections below:

**Reinforcement Procedures After Student Engages in Desired Replacement Behavior**

- **Memo:** «

**Behavior Management/Consequences if Inappropriate Target Behavior Continues (Nonrestrictive Intervention)**

- **Memo:** «

**Prior Interventions Tried, Length of Interventions, and Results (describe effective and ineffective interventions).**

- **Memo:** «

---

Page 2 continues the process. Again, fill in the Memo boxes in each of the three sections:

<table>
<thead>
<tr>
<th>Environment</th>
<th>How can the environment or circumstances that trigger the target behavior be adjusted? (Refer to Simple FBA, Simple BIP, and Complex FBA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memo</td>
<td>«</td>
</tr>
</tbody>
</table>

| Instruction and/or Curriculum | What changes in instructional strategies or curriculum would be helpful? (Refer to Simple FBA, Simple BIP, and Complex FBA) |
| Memos        | «                                                                                                                                 |

| Positive Supports | Describe all additional services or supports needed to address the student's identified needs that contribute to the problem behavior. (Refer to Simple FBA, Simple BIP, and Complex FBA) |
| Memos          | «                                                                                                                                 |

---

Fill in the Memo box to describe the motivation and/or reward being used for replacement behaviors:

**Motivators and/or Rewards** | Describe how the student will be reinforced to ensure that replacement behaviors are more motivating than the problem behavior. (Refer to Simple FBA, Simple BIP, and Complex FBA) |
| Memo | «

Next, fill in the Memo box to describe the consequences used for the student:

**Restrictive Disciplinary Measures** | Describe any restrictive disciplinary measures that may be used with the student and any conditions under which such measures may be used (include necessary documentation and timeline for evaluation.) |
| Memo | «

Then click on each □ that applies, using the Memo box to describe the restrictive intervention as applicable:

**Restrictive Intervention If Target Behavior Escalates (Use only if needed)** (Choose all that apply)

- □ Exclusion from extracurricular activities (describe): Memo «
- □ Physical guidance within CPI guideline (describe): Memo «
- □ Inhibiting devices (if identified as lacking) (describe): Memo «
- □ Manual restraint (describe): Memo «
- □ Negative (describe): Memo «
- □ Seclusion (describe): Memo «
- □ Suspension (in school) (describe): Memo «
- □ Suspension (out-of-school) (describe): Memo «
- □ Time-out (isolation/quiet room) (describe): Memo «
- □ Not applicable at this time (describe): Memo «
- □ Other(s) (describe): Memo «
Finally, on page 2, fill in the **Memo** box to describe how an emergency situation would be handled.

**Crisis Plan** - Describe how an emergency situation or behavior crisis will be handled. **Memo**

Page 3 of the BIP deals with the data collection, training, if needed, and personnel responsible.

The first **Memo** box is used to describe the procedures and methodology of the data collection:

**Data Collection Procedures and Methods** - Describe expected outcomes of the interventions, how data will be collected and measured, timelines for and criteria to determine success or lack of success of the interventions. **Memo**

Click on each [ ] that applies, and if “other” fill in the **Memo** with the description. Also remember to click on [ ] to fill in the Number of Instructional weeks before evaluation of the plan:

**Methods of Monitoring Student Progress/Data Collection:**
(Choose all that apply)
- Direct observation
- Self-Monitoring
- Staff-Report Scale
- Other (describe) **Memo**

**Frequency of Monitoring:**
(Choose all that apply)
- Hourly
- Daily
- Weekly
- Monthly
- Quarterly
- Other (describe) **Memo**

**Number of Instructional Weeks Before Plan is First Evaluated** [ ]

Next, fill in the **Memo** to explain how the school will work with and share information with the caregivers and any training that may be needed.

**Provisions For Coordination with Caregivers** - Describe how the school will work with the caregivers to share information, provide training to caregivers if needed, and how often this communication will take place. **Memo**

**Additional Training/Material/Support Needed for Staff and/or Family to Implement Plan (If needed)** **Memo**

Click [ ] to add new lines for names and titles of person(s) responsible for implementing the plan:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
</table>

Person(s) Responsible for Implementing Behavior Intervention Plan:
Click on **Name** to get this drop down:

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alken, Myra</td>
<td>Speech &amp; Language Pathologist</td>
</tr>
<tr>
<td>Albino, Ponona</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Anastasia, Stelanie</td>
<td>Speech &amp; Language Coordinator</td>
</tr>
<tr>
<td>Anderson-Drake, Jannie</td>
<td>Psychologist</td>
</tr>
<tr>
<td>Andre, Shelly</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Apostolos, Montie</td>
<td>Assistant Principal</td>
</tr>
<tr>
<td>Arboleda, Pablo</td>
<td>Assistant Principal</td>
</tr>
<tr>
<td>Ashmann, Elizabeth</td>
<td>Psychology Intern</td>
</tr>
<tr>
<td>Avalos, Ana</td>
<td>Speech Pathologist</td>
</tr>
</tbody>
</table>

Double click on the correct names and the name and title will fill on the BIP page.

Next double click on the correct box to indicate the person responsible for monitoring the BIP.

Double click on the **Date** to pull up the calendar to put in the date of the BIP follow-up, as well as the date the BIP was given to parent.

**Persons Responsible for Monitoring:**
(Choose all that apply)

- [ ] Teacher
- [ ] Psychologist
- [ ] Social Worker
- [ ] Other (describe) **Menu»**

**Follow Up Date For Plan Evaluation:** **Date**

Behavior Intervention Plan Given to Parents by **Name** On **Date**

The **Name** at the bottom will produce this drop down to choose the name of the person who gave the BIP to the parent.
Notice and Consent Forms

Notification of Decision Regarding a Request for an Evaluation

The Notification of Decision Regarding a Request for an Evaluation is an ISBE form that is completed when a decision is made by a school district in regards to starting a special education evaluation. This form notifies the parent/guardian whether an evaluation is necessary at this time. It also gives information in regard to the reasons and relevant factors that helped the school district to make that decision. This form is filled out whenever a parent/guardian requests an evaluation within 14 school days of receiving the request.

ISBE states that if an evaluation/reevaluation is determined to be necessary, this form is utilized with the Parent/Guardian Consent for Evaluation or Parent/Guardian Consent for Reevaluation. This form is also completed when it is determined that an initial or reevaluation is not necessary. If the parent/guardian and the school district agree that a routine three-year reevaluation is not necessary, ISBE forms 34-57B and 34057B/C do not need to be completed.

Please remember that there are TWO Memo Banks that must be completed for this form as required by ISBE. The first states why the request for evaluation was made and the second states the “reasons and relevant factors for the above indicated decision”.

In addition, there is a section on this form for the case manager to fill in his or her name and sign the form. You must also check the box stating that the parents have received a copy of the Procedural Rights and Safeguards.
Parent/ Guardian provided a copy of the Explanation of Procedure/ Safeguards.
Consent for Reevaluation

ISBE states that this form is used to obtain either consent to conduct a reevaluation or obtain an agreement between the school district and parent that no additional data are needed. This is a two-page form with the first page holding the consent information and the second page as the domain page.

Waukegan Public Schools
Community Unit School District 60
1201 N. Sheridan Road
Waukegan, IL 60085

PARENT/GUARDIAN CONSENT FOR REEVALUATION

Date: 02/16/03   Student’s Name:   Twitchel
DOB: 12/22/92

CHECK ONE:   □ Reevaluation   □ Reevaluation Not Needed

Dear, Twitchel:

Resident Address:

Each school district shall ensure that a reevaluation is conducted for each child being considered for special education and related services. A reevaluation must occur at least once every three years unless the parent and school district agree that a reevaluation is not needed. A reevaluation may not occur more than once a year, unless the parent and school district agree it is necessary. The purpose of a reevaluation is to determine:

• Whether the child continues to have one or more disabilities;
• The present levels of academic achievement and functional performance of the child,
• Whether the disability is adversely affecting the child’s education
• Whether the child continues to need special education and related services, and
• Whether any additions or modifications to the child’s special education and related services are needed to enable the child to meet the measurable annual goals in the Individualized Education Program (IEP) and to participate appropriately in the general curriculum, extracurricular activities and other non-academic activities.

An evaluation considers domains (areas related to the suspected disability) that may be relevant to the educational problems experienced by the individual child under consideration. The nature and intensity of the evaluation, including which domains will be addressed, will vary depending on the needs of your child and the type of existing information already available. The IEP Team, of which you are a member, determines the specific assessments needed to evaluate the individual needs of your child. Upon completion of your child’s evaluation, a conference will be scheduled with you to discuss the findings and determine eligibility for special education and related services.
To get to the second page, look at the upper right hand side of the page. You will see a yellow box that says “Top of Form”. Click on the arrow to the right of the box to click on “Consent for Evaluation”. Once you click on “Consent for Reevaluation”, it will take you to the Domain Page.

When completing this form, you must remember that when you conduct a reevaluation, you must use this form, not the Consent for Initial Evaluation form. The Consent for Reevaluation form has an additional line for when no additional data is needed to conduct the reevaluation.

**PARENTAL/GUARDIAN AGREEMENT THAT NO ADDITIONAL DATA OR REEVALUATION IS NEEDED**

I understand the school district is not required to conduct a reevaluation to determine if my child continues to be a child with a disability. However, I may request the school district to conduct the reevaluation.

- [ ] I agree  
- [ ] I do not agree  

with the determination that no additional data is needed

Date: [ ] Date [ ] Parent/Guardian Signature [ ] Name

**PARENTAL/GUARDIAN CONSENT TO COLLECT ADDITIONAL EVALUATION DATA**

I understand the school district must have my consent for the reevaluation. If I refuse consent, the school district may, but is not required to, pursue overside procedures through due process. If the school district chooses not to pursue such procedures, the school district is not in violation of providing appropriate public education to my child. Furthermore, I understand that if I fail to respond to the request for consent, the school district may pursue the reevaluation if the school district made reasonable efforts to obtain such consent. I understand my rights as explained to me and contained in the Explanation of Procedural Safeguards. I understand the scope of the evaluation as described on page 2 of this form.

- [ ] I give consent  
- [ ] I do not give consent  

to collect the evaluation data as described on page 2 of this form.

Date: [ ] Date [ ] Parent/Guardian Signature [ ] Name
In addition, when completing the domain page of the Consent for Reevaluation, you must click on each memo bank in order to fill in what type of assessments will be conducted. ISBE states that you do not have to include the names of specific assessment tools that you will use. The memo banks do include suggested assessments for each practitioner to use, but you can use your own wording for each box. You can type directly into the upper white rectangular box above the memo bank suggestions.
Consent for Initial Provision of Special Education and Related Services

ISBE states that this form is for parents to provide consent for their child to start receiving special education and related services. The form is completed and signed once a student has been found eligible for special education and related services, an IEP has been developed, and the student has been recommended by an IEP team to initiate services. If the parent does not want his or her child to start special education services, parents must sign the form stating that he or she does not give consent for initial services. Special Education services do not begin until this form is signed by the parent/guardian.

PARENT/GUARDIAN CONSENT FOR INITIAL PROVISION OF SPECIAL EDUCATION AND RELATED SERVICES

Date: 02/13/08  Student's Name: Twanett Bird  DOB: 12/22/92

Dear Twanett Bird,

At a recent conference your child was recommended for initial provision of special education and related services and an Individualized Education Program (IEP) was developed. Before a school district can provide the special education services described in your child's IEP, your informed written consent is required. Your consent is voluntary and you may revoke your consent at anytime. If you revoke consent, it does not negate an action that has occurred after the consent was given and before the consent was revoked.

CHECK ONE:

☐ I give consent  For the initial special education and related services of my child as indicated on the Individualized Education Program (IEP). The proposed special education and related services have been fully explained to me and are consistent with the IEP developed for my child.

I understand that my consent is voluntary. I understand that my consent is not required for continued services or change in services/implementation. At least annually, I will be given reasonable opportunity for comment on and input into my child's IEP.

I received a copy of the Explanation of Procedural Safeguards which have been fully explained to me by school personnel, including the procedures for requesting an impartial due process hearing.

I understand that as soon as possible following development of the IEP, but not more than ten (10) calendar days, special education and related services will be made available to my child in accordance with the IEP.

☐ I do not give consent  For the special education and related services of my child as indicated on the Individualized Education Program (IEP).

I understand that the school district will not be in violation of the requirement to make available a free appropriate public education for my child if I refuse to give consent.

☐ I have received  Copy of the IEP, Eligibility Summary  Copy of the Individualized Education Program (IEP)  Other: Text

Date: 02/13/08  Parent/Guardian Signature  Name

If you have any questions concerning this process or require additional information regarding your and your child's rights, please contact:

Name: Christina Connolly-Wilson  Title: Lead Psychologist  Phone: (247) 451-5580

Sincerely,

(Signature)

Name: Christina Connolly-Wilson  Title: Lead Psychologist

8.45
Delegation of Rights to Make Educational Decisions

The Delegation of Rights form (ISBE form 34-58K) provides the school district notice that a student, who has reached the age of majority (18 years of age), has delegated his or her parent or other individual to represent his or her educational interests. This form must be provided to the student at the IEP meeting during the school year when he or she turns 17 years of age. If the student and he or her parents do not attend the meeting, this form must be mailed to both parties along with the Parent/Guardian and Student Notification of Transfer or Rights Due to Age of Majority (ISBE form 34-57I). The Delegation of Rights form will remain in effect for one year after the date of execution. It may be renewed annually with written authorization of the student and the person delegated to represent his or her educational interests. The designee, responsible for representing the student’s educational interests, must accept the delegation by providing his or her signature.

### Delegation of Rights to Make Educational Decisions

<table>
<thead>
<tr>
<th>Student's Name:</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tawney Bird</td>
<td></td>
</tr>
</tbody>
</table>

Date of Birth: 12/22/92  Date of Age of Majority:  

I, Tawney Bird, an 18 years of age or older and a student who has the right to make educational decisions for myself under State and Federal law, I have not been adjudged incompetent and, as of the date of the execution of this document, I hereby delegate my right to give consent and make decision concerning my education to the individual identified below. This individual will be considered my "parent" for purposes of the Individuals with Disabilities Education Improvement Act of 2004 and Article 14 of the School Code and will exercise all of the rights and responsibilities concerning my education that are conferred on a parent under those laws.

I understand and give my consent for this individual to make all decisions relating to my education on my behalf. I understand that I have the right to be present at meetings held to develop my Individual Education Program (IEP) and that I have the right to raise any issues or concerns I may have and that the school district must consider them.

This delegation will be in effect for one year from the date of execution below and may be renewed by my written or other formal authorization. I also understand that I have the right to terminate the Delegation of Rights at any time and assume the right to make my own decisions regarding my education. I understand that I must notify the school district immediately if I revoke this Delegation of Rights prior to its expiration.

- [ ] (Optional) - I have received this form and have chosen NOT to delegate my rights

- [ ] (Required) - I have received this form and have CHOSEN to delegate my rights to the individual listed below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of &quot;Parent&quot; Representative</td>
<td>Relationship</td>
</tr>
</tbody>
</table>

"Parent" Representative Signature Date
Consent for Initial Evaluation

The Parent/Guardian Consent for Initial Evaluation form (ISBE 34-57B/C) is to obtain consent to conduct an initial evaluation. The evaluation process should be sufficient in order to determine whether a student has a disability, whether the disability adversely affects his or her educational performance in the general education curriculum, and to make a determination of the nature and extent of the student's need or specially designed instruction and any related services. The Parent/Guardian Consent for Initial Evaluation form is a two-page form that includes the consent page and the domain page. The evaluation cannot be initiated until 10 days after consent is obtained unless the parent signs to waive the ten days. Any evaluation recommended by the district must be documented on ISBE form 34-57 B/C and is the financial responsibility of the district. The “sources from which data will be obtained” box on ISBE form 34-57 B/C should contain, at a minimum, the title of the individual who will obtain the additional data. The IEP team may use multiple copies of ISBE form 34-57 B/C as necessary to document their determinations for the evaluation. This form and the form for a Reevaluation are different so please remember that these forms are not interchangeable.

PARENT/GUARDIAN CONSENT FOR INITIAL EVALUATION

Date: 10/27/00  Student’s Name: Twenty Bird  DOB 12/22/92

Dear Twenty Bird,

(Parent/Guardian’s Name)

Each school district shall ensure that a full and individual evaluation is conducted for each child being considered for special education and related services. The purpose of an evaluation is to determine:

- Whether the child has one or more disabilities;
- The present levels of academic achievement and functional performance of the child;
- Whether the disability adversely affects the child’s education; and,
- Whether the child needs special education and related services.

An evaluation considers domains (areas related to the suspected disability) that may be relevant to the educational problems experienced by the individual child under consideration. The nature and intensity of the evaluation, including which domains will be assessed, will vary depending on the needs of your child and the type of existing information already available. The IEP Team, of which you are a member, determines the specific assessments needed to evaluate the individual needs of your child. Within 60 school days from the date of parent/guardian consent, a conference will be scheduled with you to discuss the findings and determine eligibility for special education and related services.

The IEP team must complete Step 2 of this form prior to obtaining parental consent for evaluation.

PARENT/GUARDIAN CONSENT FOR INITIAL EVALUATION

I understand the school district must have my consent for the initial evaluation. If I refuse consent for an initial evaluation, the school district may, but is not required to, pursue override procedures through due process. If the school district chooses not to pursue such procedures, the school district is not in violation of the required evaluation procedures. I understand my rights as explained to me and contained in the Explanation of Procedural Safeguards. I understand the scope of the evaluation as described on page 2 of this form.

☐ I give consent  ☐ I do not give consent to collect and/or review the evaluation data as described on page 2 of this form.

Date: 10/27/00  Parent/Guardian Signature: [Signature]

In order to switch back and forth between the consent page and the domain page, please click on the down arrow next to “Top of Form” on the top right side of TERA. There you can go back and forth between the two pages. The “Consent for Evaluation” form is the domain page.
The domain page is used to document the assessments that are to be completed for the evaluation. This form is completed at a Domain Meeting. Under “Sources From Which Data Will Be Obtained”, please indicate the title of the individual completing that section of the domain and place their signature next to their title. In addition, please check “Yes” under Relevant if a person is conducting a new assessment. If no additional assessment data is needed, please check “No”. Please make sure that each memo box is filled in. Do not leave any memo banks blank during an initial full case study.

You can click on “Memo” to place information in the memo box. As a reminder, you can use the wording in the memo bank on the bottom left side of the memo box. You can also type in your own wording or edit the phrases given in the memo bank in the upper white box in the memo box. You must click ok or cancel to exit the memo box and return to the previous screen. For additional instructions on the memo boxes, please see the appendix on Memo Banks.
Notification of Conference Recommendations

ISBE states that this form is used to summarize and notify the parent/guardian of any recommendations made at the IEP meeting. When completing this form, ALL boxes that apply to the meeting should be checked that summarize the recommendations of the IEP conference. The case manager should complete this form at the end of the IEP meeting and is given to the parent with a copy of the IEP. In addition, the case manager should include his or her name and contact information at the bottom of the form.
Parents may also sign this form to agree to waive the 10 calendar days before their child can begin either an initial or change of special education placement.

Notification of Conference

The Parent/Guardian Notification of Conference form informs the parent(s)/guardian(s) of the date, time, and location of the conference to discuss the educational needs of their child, the purpose of that conference, and those persons who have been invited to attend.

The form must be dated and mailed in at least 10 calendar days prior to the scheduled conference. The parent may agree to waive the 10-calendar day requirement.
PARTICIPANTS:

- Please insert the names and titles of all individuals who will be invited to the IEP meeting for the purpose identified on the Notification of Conference form.
- Please list all required personnel including students age 14 ½ and older when addressing needed transition services.

In order for Excent Tera to auto-fill the IEP participants, on the first page of the IEP, the Parent Notification of Conference needs to be done BEFORE the IEP is started. The student’s case manager completes the Parent Notification of Conference form.


9. Once you have opened the new document, fill in the conference date, time, and location. In addition, please review the Parent/Guardian name to verify if it is correct. If the Parent/Guardian name does not auto-fill, click on the Name link and select the correct Parent/Guardian name.
In order to discuss the educational needs of your child, you are invited to attend an IEP conference meeting to be held:

Date: 03/2/2023 Time: 9:00am Location: Lincoln Center

You are a participant on the IEP Team which will meet to address the purpose as indicated in the next section. You have the right to bring other individuals who have knowledge or special expertise regarding your child. If you plan to bring other individuals, please notify the individual indicated below prior to the meeting so arrangements and accommodations for participants can be made. If these meeting arrangements are not agreeable and/or you require an interpreter or translator, please contact the individual indicated below.

The purpose of this conference is to:

- Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
- Review your child's recent evaluation to determine, reconsider, or change your child's eligibility for special education and related services.
- Review your child's eligibility and needs for special education and related services.
- Review and/or develop your child's Individualized Education Program (IEP) and determine the child's educational placement.
- Consider post-secondary goals and transition services (beginning at age 14 1/2).
- Consider the child's readiness for disciplinary code violation(s).
- Consider the need for an individualized behavioral assessment for your child.
- Review a need to create or revise a behavior intervention plan for your child.
- Review your child's recent change of placement due to suspension.
- Determine the location of the interim alternative educational setting.
- Review anticipated dates of graduation.
- Other: Text

The invited individuals and their titles are listed below. If one of the individuals listed below is unable to attend due to unforeseen circumstances, the district will designate an appropriate and suitable replacement to attend the IEP meeting. Any student, age 14 1/2 and older must be invited to any meeting if the purpose of the meeting is to consider transition service needs.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jose Lara</td>
<td>Principal</td>
</tr>
<tr>
<td>Beth Ruiz</td>
<td>Special Education Coordinator</td>
</tr>
<tr>
<td>Mike White</td>
<td>Parent</td>
</tr>
<tr>
<td>Carolina Brown</td>
<td>Social Worker</td>
</tr>
<tr>
<td>Jane Miller</td>
<td>Nurse</td>
</tr>
<tr>
<td>James Johnson</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Sarah Rodriguez</td>
<td>Regular Education Teacher</td>
</tr>
<tr>
<td>Amy Adams</td>
<td>Speech Language Pathologist</td>
</tr>
<tr>
<td>Christina Gonzalez</td>
<td>Parsley Coordinator</td>
</tr>
<tr>
<td>Name</td>
<td>Title</td>
</tr>
</tbody>
</table>

10. Next, you must select the purpose of the IEP conference. Double click on the box to place a “check mark” in the box.

11. The next step is to place the IEP team participants on the conference form. Double Click on the “Down Arrow” to add Name and Title links. Double Click once for each participant to invite to the meeting. Click on the Name link to add IEP participants.
12. If the participant’s name is not in the Participant List, you can type in their name and title manually where it says “Name” and “Position/Role” under New Value.

13. Under the next section that discusses the Procedural Rights and Safeguards, please place the name and telephone number of the student’s case manager.

You and your child have protection under the procedural safeguards of special education regulations. The school district must provide you a copy of *Explanation of Procedural Safeguards* once a year. Please contact the district if you need a copy of *Explanation of Procedural Safeguards*.

Name: Christia Connelly  Title: Psychology Coordinator  Phone: 847-360-3380 Ext

14. Then, place the name of the person who created and filled out the Notification of Conference form in the last Name link. Please remember to sign your name under “Sincerely”!

Sincerely,

__________________________________________

Name: Christia Connelly-Wilson  Title: Psychology Coordinator

**Excusal of IEP Team Member**

This form provides the written documentation for the excusal of one of the required team members. A required team member is described as the general education teacher, special education teacher, LEA representative, and/or an individual who can interpret the instructional implication of evaluation results.
The district and the parent/guardian may agree, in writing, to excuse an IEP team member under the following circumstances:

- Attendance of the member is not necessary because the member’s area is not being modified or discussed
- Meeting does involve a modification to or discussion of the special and related services but the team members submits, in writing, input into the development of the IEP prior to the meeting.

The district should make every effect to ensure that other team members are present at the meeting. If one of the other invited individuals is unable to participate, that team member is needed to submit, in writing, input into the development of the IEP prior to the meeting.

Additional notes:
- The district should communicate with the parent/guardian about the excusal prior to sending the written notice. The type of communication should be noted on this form.
- The parent/guardian’s signature is required to demonstrate agreement.
- The district should not “routinely” excuse IEP team members, as this would not be in compliance with the regulations.

Double click to check the box, which states how the parent/guardian received IEP report. Double click to check the box in which to determine if content area will be discussed or not. Double click name to specify which team member is excused. Have parent sign and date form. Fill in the other documents by double clicking the blue memo banks.
The form provides the parent/guardian and student notice of the transfer of rights when the student reaches the age of majority (18 years of age).

This form must be sent to the parent/guardian and student one year prior to the student’s eighteenth birthday. This provides notice that the transfer will occur automatically on the student’s eighteenth birthday.

Additional note:

• If a student with a disability has been determined to be incompetent under State law, the student’s parent/guardian must provide the district with a copy of the court order. This document will identify the individual designated to represent the student’s educational rights.

Double click the blue memo banks to complete page. Double click the box to specify how this form serves as documentation.
Parent Notification of IEP Amendment

This form notifies the parent/guardian of changes that have been made to the IEP when the district and the parent/guardian agree not to reconvene the IEP meeting for the purposes of making changes to a student’s IEP.

Additional note:
- It is recommended only for IEP changes that do not significantly change a student’s services and/or placement.
- This cannot take the place of an annual review meeting.
- Form must be attached to the IEP.
- A copy of the student’s current IEP, along with this form should be given to the parent/guardian.

Double click the blue memos and select from the drop downs. Double click the box to check how the parent/guardian was informed of IEP changes. Print and have the parent/guardian sign and date.
Withdrawal of Consent for Special Education Placement

This form acknowledges the district that a parent/guardian would like to withdraw his/her child from the special education programs and services he/she is receiving.

Additional note:

- The Procedural Safeguards should be explained to the parent/guardian, including the due process hearing section.
- Acknowledgement of Receipt and Explanation of Procedural Safeguards form should be completed to show documentation of due process hearing procedures.

Double click the blue memo banks to complete page. Double click the blue memo bank to write a narrative in stating why the parent revokes consent. Have parent/guardian sign and date.

Parent Acknowledgement of Receipt and Explanation of Procedural Safeguards

This form shows receipt that the parent/guardian has been notified of their rights and responsibilities have been given to them in writing and fully explained, including the procedures for requesting an impartial due process hearing. Double click blue memo banks to complete page. Print and have parent/guardian sign and date.

Student Name: Road Runner  DOB: 07/27/99  Student Id: 2021

My reason(s) for revoking consent are:

My rights and responsibilities have been given to me in writing and have been fully explained to me by [Name] on [Date], including the procedures for requesting an impartial due process hearing.

Parent Name: [Name]  Date: [Date]

Student Birthday: 07/27/99  School: Justice  Parent Name: [Name]  Date: [Date]
Authorization for Release of Records and Communications

This form provides the district with permission of the parent to release records and share confidential information to be used for the purposes of Educational evaluation/programming and Health Assessment and planning for health care services and treatment in school.

Additional note:
- This form is not to exceed one year of authorization.
- Parent may withdraw authorization at any time by submitting a written notice.

Double click on the blue memo banks to complete page. Double click on the boxes to specify what information is requested. Have parent sign and date.
<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Twenty-First</td>
<td>Date</td>
</tr>
<tr>
<td>Signature of Minor over the Age of 12 (Mental Health Records)</td>
<td>Date</td>
</tr>
<tr>
<td>Name</td>
<td>Date</td>
</tr>
<tr>
<td>Signature of Witness (Mental Health Records)</td>
<td>Date</td>
</tr>
</tbody>
</table>

Note to Agent/Person Receiving Records: Under the provision of the Mental Health and Developmental Disabilities Confidentiality Act, 740 ILCS 110/5(d), the Federal Education Rights Privacy Act, 34 CFR 99.33(a), and the Illinois School Student Record Act, 105 ILCS 10-8(d) you may not disclose any of the information without first obtaining specific written consent conforming with the appropriate Act.
Evaluation

Child Outcomes Rating and Summary Forms

This document is used for every student entering special education at 3 years of age, or more, for the first time. It is used again when the student exits the special education program, or when they turn five. For more information about this form see ISBE “Instructions for Using the Illinois Child Outcomes Rating Scale and Summary Form.”

Decision Tree for Summary Rating Discussions

The Early Childhood Outcomes Center revised by VVEC 6-9-08
The top portion will auto fill with the student’s name, date of birth and CIMS (SID) number.

**EARLY CHILD OUTCOMES SUMMARY FORM**

<table>
<thead>
<tr>
<th>Entry ☑</th>
<th>Exit ☐</th>
<th>Date: 02/17/09</th>
</tr>
</thead>
</table>

**Name:** Brad, Twenty  
**SID:** 2019  
**Gender:** Male  
**DOB:** 12/22/92

**District:** Waukegan CUSD 60  
**School:** Lincoln Center

You need to mark the appropriate box to indicate whether the scales are being completed as the child enters or exits the preschool special education services.

☑ Entry ☐ Exit

To fill in the [Date: 09/27/02], double click on [Date] to see the following:

Dates are filled in here the same as in other documents.

For the next section,

<table>
<thead>
<tr>
<th>Persons involved in deciding summary ratings - Role/Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
</tbody>
</table>

Click on the [Name] to get

Double click on [Name] and the following box should appear:

highlight your name, then click [OK]. Next, double click
on **Roles** to have this box pop up: **Here**, click on the **OK** to have the roles pop up, highlight correct role and click **OK**. Repeat for all attendees.

The next section deals with the different areas being assessed, and should be filled out for ALL initial “entry” forms.

<table>
<thead>
<tr>
<th>Positive Social Relationships</th>
<th>Acquire and Use Knowledge and Skills</th>
<th>Take Appropriate Action to Meet Own Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Net Yet</td>
<td>1 - Net Yet</td>
<td>1 - Net Yet</td>
</tr>
<tr>
<td>2 - Between Emerging and Not Yet</td>
<td>2 - Between Emerging and Not Yet</td>
<td>2 - Between Emerging and Not Yet</td>
</tr>
<tr>
<td>3 - Emerging skills</td>
<td>3 - Emerging skills</td>
<td>3 - Emerging skills</td>
</tr>
<tr>
<td>4 - Between Somewhat and Emerging</td>
<td>4 - Between Somewhat and Emerging</td>
<td>4 - Between Somewhat and Emerging</td>
</tr>
<tr>
<td>5 - Somewhat</td>
<td>5 - Somewhat</td>
<td>5 - Somewhat</td>
</tr>
<tr>
<td>6 - Between Somewhat and Completely</td>
<td>6 - Between Somewhat and Completely</td>
<td>6 - Between Somewhat and Completely</td>
</tr>
<tr>
<td>7 - Completely</td>
<td>7 - Completely</td>
<td>7 - Completely</td>
</tr>
</tbody>
</table>

Check the box next to the appropriate box in each section. Use the Decision Tree for your discussion and making the correct rating 1-7.

Each section has a **Summary of Evidence** and **Sources of Supporting Evidence** that need to be filled out. In each case, click on the **Memo** and then use a narrative in the memo box that
appears. For **Date**, double click as on other documents to get which will automatically fill in the current date. If you need a different date, click on the to get the calendar box as in other sections of Tera documents.

![Calendar](calendar.png)

Remember to double click on the correct date to populate that field.

Next, you need to check the appropriate boxes (yes or no), and indicate how the parent was involved in the rating:

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did a Coordinator, LEA Representative or Administrator Participate in the Ratings?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did an Early Childhood Teacher Participate in the Ratings?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did a Psychologist or Social Worker Participate in the Ratings?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did a Speech/Language Pathologist Participate in the Ratings?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did another Related Service Provider (e.g., OT/PT) Participate in the Ratings?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How was Parent Involved in the Ratings?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Information Received in Team Meeting from Parent</td>
</tr>
<tr>
<td>2</td>
<td>Information from Parent (incorporated assessment(s))</td>
</tr>
<tr>
<td>3</td>
<td>Did Not Use Information from Parent in Rating Process</td>
</tr>
</tbody>
</table>

Entry data is now complete. When a child exits, you use the same form, but check “exit” at the top of the page, and then you fill out ONLY the bottom sections, checking the appropriate boxes:

**Exit Rating Only**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Made Progress Positive Social Relationships?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Made Progress Acquire use and Knowledge Skills?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Made Progress Take Appropriate Action to Meet Own Needs?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Assessment (Select Only One)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Assessment and Evaluation Programming System (AEPS)</td>
</tr>
<tr>
<td>2 - Carolina Curriculum for Infants and Toddlers: Special Needs</td>
</tr>
<tr>
<td>3 - HighScope Child Observation Record</td>
</tr>
<tr>
<td>4 - Creative Curriculum Assessment</td>
</tr>
<tr>
<td>5 - Home Early Learning Profile (HELP)</td>
</tr>
<tr>
<td>6 - Individual Growth and Development Indicators (IGDI)</td>
</tr>
<tr>
<td>7 - Transdisciplinary Play-Based Assessment (TBA)</td>
</tr>
<tr>
<td>8 - Work Sampling System</td>
</tr>
<tr>
<td>9 - Child has an IEP for Speech Only</td>
</tr>
</tbody>
</table>

**Entered into SIS by:** [Name]  **Date:** [Date]
Documentation of Evaluation Results

The special education evaluation team completes this form for initial evaluations, reevaluations, or a review of an independent or outside evaluation. While considering all available evaluation data, the evaluation team shall record the team’s analyses of the student’s functional levels. Only those areas that were identified as “relevant” on the domain sheet must be completed. All other areas should be noted as “Not Applicable” unless otherwise indicated. Evaluation data may include: parental input, teacher recommendations, physical condition, social or cultural background, adaptive behavior, record reviews, interviews, observations, testing, etc. You must also describe the observed strengths and or deficits in the student’s functioning in each of the domains on this form.

There are eight domains for this form: Academic Functioning, Functional Performance, Cognitive Functioning, Communicative Status, Health, Hearing/Vision, Motor Abilities, and Social/Emotional Status/Social Functioning.

Below is a copy of the Academic Achievement section of the Documentation of Evaluation Results form. You can place information within each section of the form by using the Memo Box that is marked “Memo”. You can double click on it to gain access into the Memo Box.

**DOCUMENTATION OF EVALUATION RESULTS**

Student Name: **Twisty Bird**
Date of Birth: **12/22/92**

Date of Meeting: **11/05/02**

**Complete for initial evaluations, reevaluations, or a review of an independent or outside evaluation.**

Considering all available evaluation data, record the team’s analyses of the student’s functioning levels. Only those areas which were identified as relevant to the current evaluation must be completed. All other areas should be noted as “Not Applicable”. Evaluation data may include: parental input, teacher recommendations, physical condition, social or cultural background, adaptive behavior, record reviews, interviews, observations, testing, etc. You must also describe the observed strengths and or deficits in the student’s functioning in the following domains.

**Academic Achievement (Current or past academic achievement data pertinent to current educational performance)**

**Memo**

**Name:** **Twisty Bird**
**Grade:** 5

**Date of Birth:** 12/22/92
**Date(s) of Evaluation:** 10/11/08, 10/18/08, 10/19/08

**School:** Bird School
**Chronological Age:** 10.2

**CMS:** 999999
**CR:** 90001

**Reason for Academic Achievement Assessment:**

Twisty was referred for a three year re-evaluation to determine continued eligibility for special education services.

**Educational History and Academic Background:**

Twisty is a ten year old fifth grade at Bird School. He attended Flying School first through second grade. His third grade report card (06-07) indicated that Twisty received mostly C’s and a B. His attendance record reports that he attends school regularly.

He was evaluated to conduct his triennial evaluation to determine continued eligibility for special education services. Twisty was initially found eligible for services under the Other Health Impaired category in the Bird School District. His initial case study evaluation was May 2003. He was initially referred for an evaluation due to significant academic difficulties in the second grade.

Twisty is currently receiving special education services at Bird School for Resource, Speech, and Social Work.

During Twisty’s initial evaluation, he was given the WISC-III to measure his cognitive skills and the WJAT to measure his academic abilities. His WISC-III Verbal IQ was 87 and in the borderline range, while his Performance IQ score was 96 and in the average range. The scores on the WJAT demonstrated below average skills in reading (Word Reading < K.5, Reading Comprehension < K.5) and grade level skills in math and spelling.
Below are copies of Functional Performance, Cognitive Functioning, Communication Status, Health, Hearing/Vision, and Motor Abilities respectively.

**Functional Performance**

*Current or past functional performance data pertinent to current functional performance*

**Reason for Functional Performance Assessment**

Twisty was referred for a functional performance assessment due to low performance in all academic areas and significant behavioral concerns.

**Functional Performance Assessment**

A Functional Behavioral Assessment (FBA) was completed for Twisty Bird. Please refer to the FBA documentation that is attached to the IEP.

**Vineland Adaptive Behavior Scales (Vineland)**

<table>
<thead>
<tr>
<th>Domain</th>
<th>Standard Score</th>
<th>%ile Score</th>
<th>Age Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Domain</td>
<td>6</td>
<td>12</td>
<td>0.9</td>
</tr>
<tr>
<td>Daily Living Skills Domain</td>
<td>93</td>
<td>32</td>
<td>10.10</td>
</tr>
<tr>
<td>Socialization Skills Domain</td>
<td>88</td>
<td>1</td>
<td>6.5</td>
</tr>
<tr>
<td>Adaptive Behavior Composite</td>
<td>76</td>
<td>5</td>
<td>9.0</td>
</tr>
</tbody>
</table>

**Maladaptive Behavior Domains**

The Vineland was used to Twisty's adaptive behavior in the home and neighborhood and his mother provided information for this portion of the assessment interview. The scores obtained by Twisty on this instrument indicate he is functioning at a below average level; however, he is functioning globally at a level commensurate with the current estimate of his intellectual abilities. The responses from the Vineland were given from his mother.

The Communication Domain of the Vineland contains information on the ability to understand and express communication verbally, non-verbally, and in a written format. Twisty's score on this Domain is an 86, which places him at the 10th percentile and

**Cognitive Functioning**

*Data and other information regarding intellectual ability, how the student takes in information, understands information, and expresses information*

**Reason for Cognitive Functioning Assessment**

Twisty was referred for a cognitive functioning evaluation due to low academic functioning in all academic areas (reading, math, and writing) according to his fall 2006 and spring 2006 curriculum-based measurement benchmarking.

**Cognitive Functioning Assessment**

**Universal Nonverbal Intelligence Test (UNIT)**

<table>
<thead>
<tr>
<th>Subtest</th>
<th>Standard Score</th>
<th>Percentile</th>
<th>Descriptive Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Scale</td>
<td>83</td>
<td>14</td>
<td>Low Average</td>
</tr>
<tr>
<td>Memory Quotient</td>
<td>74</td>
<td>4</td>
<td>Delayed</td>
</tr>
<tr>
<td>Reasoning Quotient</td>
<td>100</td>
<td>55</td>
<td>Average</td>
</tr>
<tr>
<td>Symbolic Quotient</td>
<td>89</td>
<td>22</td>
<td>Low Average</td>
</tr>
<tr>
<td>Perceptual Quotient</td>
<td>84</td>
<td>14</td>
<td>Low Average</td>
</tr>
<tr>
<td>Scaled Scores</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Symbolic Memory</td>
<td>5</td>
<td>5</td>
<td>Low Average</td>
</tr>
<tr>
<td>Cube Design</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spatial Memory</td>
<td>5</td>
<td>5</td>
<td>Low Average</td>
</tr>
<tr>
<td>Analogic Reasoning</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Object Memory</td>
<td>7</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Mazes</td>
<td>11</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Wechsler Intelligence Scale for Children—Fourth Edition**

<table>
<thead>
<tr>
<th>Subtest</th>
<th>Standard Score</th>
<th>Percentile</th>
<th>Descriptive Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Scale</td>
<td>84</td>
<td>14</td>
<td>Low Average</td>
</tr>
<tr>
<td>Verbal Comprehension</td>
<td>85</td>
<td>16</td>
<td>Low Average</td>
</tr>
<tr>
<td>Perceptual Reasoning</td>
<td>96</td>
<td>29</td>
<td>Average</td>
</tr>
</tbody>
</table>

**Recommended Interventions**

- Develop strategies for maximizing learning opportunities during classroom activities.
- Incorporate visual, auditory, and kinesthetic teaching methods to support learning.
- Provide opportunities for independent exploration and self-direction.
- Use positive reinforcement and praise to encourage appropriate behaviors.
- Collaborate with Twisty's classroom teacher to ensure consistency in strategies at home and school.

**Current Functional Performance**

*Current or past functional performance data pertinent to current functional performance*

**Reason for Functional Performance Assessment**

Twisty was referred for a functional performance assessment due to low performance in all academic areas and significant behavioral concerns.

**Functional Performance Assessment**

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The Communication Domain of the Vineland contains information on the ability to understand and express communication verbally, non-verbally, and in a written format. Twisty's score on this Domain is an 86, which places him at the 10th percentile and
Any member of the evaluation team that has the certification necessary to complete that portion of the evaluation can complete each section. For example, the Special Education Teacher and the School Psychologist can complete the Academic Performance Section. Hearing and Vision can be completed by the School Nurse and the Vision and Hearing Itinerant Teachers. For each section that is completed, the individual who places information into the report needs to have a place for their signature, printed name, and title.
If more than one person completes a section of the domain, then it requires a signature of each person that has filled in information on that section. The signature lines are placed at the bottom of each domain after the sections of the report. Each domain should have a separate signature line. For example, if Academic Achievement and Communication Status domains are completed for the evaluation, then there should be at least two signature lines on the Documentation of Evaluation Results. One signature is for Academic Achievement and one is for Communication Status.

Summary of Social/Emotional Functioning Assessment

After reviewing all evaluation results, it is the examiner’s conclusion that [Student’s name]’s behavior was congruent with a diagnosis of Severe Major Depressive Disorder, Single Episode, with Psychotic Features and Attention Deficit Hyperactivity Disorder, Impulsive Type.

Sally Peterson, MSW
School Social Worker

Christina Conolly-Wilson, Psy.D, NCSP
School Psychologist

For each domain of the Documentation of Evaluation Results, please follow the district format for writing each section. Each section should have:

1. Reason for __________ __________ Assessment (fill in with the domain title, i.e. Academic Achievement Functional Performance, etc.)
2. __________ __________ Results (fill in with the domain title)
3. Summary of __________ __________ (fill in with the domain title)

You can include additional information or components of the evaluation within each of the three sections. The only domain that has additional information that is outside of the three sections is Academic Achievement. You also place the student’s demographic information (name, date of birth, school, CIMS number, Central File number, Chronological Age, the Dates of the Evaluation, Educational History and Academic Background, and Classroom Observation information in that domain.

Eligibility Determination – Other than SLD

The Eligibility Determination-Other than SLD form (ISBE 37-44B) is used to document special education eligibility and which category the student qualifies under. Please make sure to attach the special education eligibility criteria to this form. If you need copies of the special education eligibility criteria for each category, please see the school psychologist in your building. Please make sure to complete each memo box under each Step.
ELIGIBILITY DETERMINATION
(ALL DISABILITIES OTHER THAN SPECIFIC LEARNING DISABILITY)

Student Name: TwentyBird
Date of Birth: 12/22/92
Date of Meeting: 02/2012

DETERMINANT FACTORS

☐ Yes ☐ No Lack of appropriate instruction in reading, including the essential components of reading instruction (Evidence Provided) Memo

☐ Yes ☐ No Lack of appropriate instruction in math (Evidence Provided) Memo

☐ Yes ☐ No Limited English Proficiency (Evidence Provided) Memo

If any of the above answers is "yes" the student is not eligible for services under IDEA and the team must complete Step 1 and 4 below. If all of the answers are "no," complete Steps 1-4.

COMPLETE FOR STUDENTS SUSPECTED OF HAVING DISABILITY UNDER IDEA.

STEP 1 - DISABILITY

☐ No Disability Identified (Complete Step 4 and write "Not Eligible For Special Education Services" in the Disability section of the Conference Summary Report page.)

☐ Disability Identified

Based on the team's analysis, identify the disability area(s):

Primary
Emotional Disability
Secondary
Other Health Impairment

Eligibility Determination Criteria.

Memo: Please see attached eligibility criteria for Emotional Disability and Other Health Impairment.

STEP 2 - ADVERSE EFFECTS

☐ No Adverse Effect Identified

(Complete Step 4 and write "Not Eligible For Special Education Services" in the Disability section of the Conference Summary Report page.)

☐ Adverse Effect Identified

For each disability identified, describe how the disability adversely affects the student's educational performance.

Memo: TwentyBird's emotional disability and other health impairment are significantly impacting his educational performance in all academic areas. He is also having significant behavioral problems that are impacting his education even after behavioral interventions have been in place.

STEP 3 - EDUCATIONAL NEEDS

State to what extent the student requires special education and related services to address educational needs.

Memo: TwentyBird requires special education in order to be successful in the academic setting.

STEP 4 - ELIGIBILITY

IDEA 300.483 (7/07)

Page of

Based on the steps above, the student is entitled to special education and related services.

☐ No (Not Eligible)

☐ Yes (Eligible)
Documentation of Intervention/Evaluation Results

The Documentation of Intervention/Evaluation Results form is used during an initial evaluation, reevaluation, or a review of an independent or outside evaluation when a specific learning disability is suspected. This report is used with the Documentation of Evaluation Results report. The Documentation of Evaluation Results is used for all evaluations including evaluations for suspected specific learning disability. ISBE stated that as part of the evaluation process, relevant behavior noted during observation in the child’s age-appropriate learning environment, including the general education classroom setting for school-age children, and the relationship of that behavior to the child’s academic functioning and educationally relevant medical findings, if any, must be documented.

**DOCUMENTATION OF INTERVENTION/EVALUATION RESULTS**
(SPECIFIC LEARNING DISABILITY)
(Required as of the 2010-2011 School Year)

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>TwentyBird</td>
<td>12/22/92</td>
</tr>
</tbody>
</table>

Date of Meeting: 02/30/03

Complete for initial evaluations, reevaluations, or a review of an independent or outside evaluation when a specific learning disability is suspected.

As a part of the evaluation process, relevant behavior noted during observation in the child’s age-appropriate learning environment, including the general education classroom setting for school-age children, and the relationship of that behavior to the child’s academic functioning and educationally relevant medical findings, if any, must be documented.

**PROBLEM IDENTIFICATION / STATEMENT OF PROBLEM:**
Using existing data, please provide an initial performance discrepancy statement for all identified areas of concern in the relevant domains (academic performance, functional performance, cognitive functioning, communicative status, for ELL, student includes an explanation of ESL status and any change in linguistic status, emotional status, functioning, motor ability, health, hearing, and vision) including information about the student’s performance discrepancy prior to intervention. Attach evidence.

**PROBLEM ANALYSIS / STRENGTH AND WEAKNESSES:**
Describe student’s skill strengths and weaknesses in the identified area(s) of concern with the relevant domains. Attach evidence, including evidence of skills deficit versus performance deficit.

**PLAN DEVELOPMENT / INTERVENTION(S):**
Describe the previous and current intervention plans (core/Tier 1, supplemental/Tier 2, and intensive/Tier 3) including evidence that the intervention is scientifically based and was implemented with integrity. Attach plan/evidence.

**PLAN EVALUATION / EDUCATIONAL PROGRESS:**
Provide documentation of student progress over time as a result of the intervention. Attach evidence/graphics.

**PLAN EVALUATION / DISCREPANCY:**
State the current performance discrepancy after intervention, i.e., the difference between a student’s level of performance compared to the performance of peers or scientifically-based standards of expected performance. Attach evidence.

**PLAN EVALUATION / INSTRUCTIONAL NEEDS:**
Summarize the student’s needs in the areas of curriculum, instruction, and environment. Include a statement of whether the student’s needs in terms of materials, planning, and personnel required for intervention implementation are significantly different.
Eligibility Determination-Specific Learning Disability

The Eligibility Determination-Specific Learning Disability form (ISBE 37-44D) must be completed for initial evaluations, reevaluations, or a review of an independent or outside evaluation when a specific learning disability is suspected.

**ELIGIBILITY DETERMINATION**

(SPECIFIC LEARNING DISABILITY)

(Required as of the 2007-2008 School Year)

Student Name: 

Date of Birth: 12/22/92

Date of Meeting: 

Complete for initial evaluation, reevaluation, or a review of an independent or outside evaluation when a specific learning disability is suspected.

**DETERMINANT FACTORS**

The determinative factor for the student's suspected disability is:

- **Yes** ☐  No ☐ Lack of appropriate instruction in reading, including the essential components of reading instruction. (Evidence Provided)  
  - Memo: 

- **Yes** ☐  No ☐ Lack of appropriate instruction in math. (Evidence Provided)  
  - Memo: 

- **Yes** ☐  No ☐ Limited English Proficiency (Evidence Provided)  
  - Memo: 

If any of the above answers are "yes" the student is not eligible for services under IDEA and the team must complete the Eligibility Determination section accordingly. If all of the answers are "no," complete the following sections.

**EXCLUSIONARY CRITERIA**

The team determined that the following factors are the primary bases for the student's learning difficulties. Document the source of evidence in each area.

- **Yes** ☐  No ☐ A visual, hearing, or motor disability. (Memo: 

- **Yes** ☐  No ☐ Cognitive disability. (Memo: 

- **Yes** ☐  No ☐ Emotional disability. (Memo: 

- **Yes** ☐  No ☐ Cultural factors. (Memo: 

- **Yes** ☐  No ☐ Environmental or economic disadvantage. (Memo: 

If any of the boxes immediately above is checked "yes," the student cannot have a primary eligibility of specific learning disability and the team must complete the Eligibility Determination section accordingly.

**INCLUSIONARY CRITERIA**

Educational Progress (Over Time)

Please make sure to complete all areas of this form and complete the memo boxes under Inclusionary Criteria and Instructional Need. Optional Criteria section is used when the evaluator using the IQ-Achievement Discrepancy to determine SLD eligibility.

**INCLUSIONARY CRITERIA**

Educational Progress (Over Time)

Evidence in the Documentation of Evaluation Results should support the team’s answer to this question.

- Yes ☐  No ☐ 

  - Select One:
  - The student is progressing at a significantly slower rate than is expected in any area(s) of concern.

  Memo: Reading, fluency and comprehension, math computation

Discrepancy (At One Point in Time)

Evidence in the Documentation of Evaluation Results should support the team’s answer to this question.

- Select One:

  ISBE 37-44D (7.07)
Only with the Eligibility Determination-SLD form will there be a signature section. This section will need to be filled in with each IEP participants’ name and whether he or she agrees with the eligibility determination. You can double click on either the “Yes” or “No” box to place a check mark in the box. If you have too many boxes, you can delete a line by double clicking on the “X” on the signature line.

Each team member must sign below to certify that the report reflects his/her conclusions for specific learning disability. Any participant who disagrees with the team’s decision must submit a separate statement presenting his/her conclusions.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Name</th>
<th>Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Name</td>
<td></td>
</tr>
</tbody>
</table>

You can double click on “Name” and either enter the IEP participant’s name in the box manual or click on the name from the list that is shown. You can manually type the name in the bottom of the box where it says “Name”. You do not have to type in the “Position/Role”.
<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheung, Winnie</td>
<td>Private &amp; Alternate Placement Coordinator</td>
</tr>
<tr>
<td>Charcole, Nicole</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Chen, Lily</td>
<td>Secretary</td>
</tr>
<tr>
<td>Cochran, Angela</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Colmen, Samantha</td>
<td>Special Education Teacher</td>
</tr>
<tr>
<td>Conner, Mary</td>
<td>Nurse</td>
</tr>
<tr>
<td>Conner, Michael</td>
<td>Social Worker</td>
</tr>
<tr>
<td>Conner, Christine</td>
<td>Psychology Coordinator</td>
</tr>
<tr>
<td>Conner, Lisa</td>
<td>Assistant Principal</td>
</tr>
</tbody>
</table>

New Value:
- **Name**: Christine Conner-Wilson
- **Position/Role**: Psychology Coordinator
Preschool Summary Form

This is the final summary page of the Illinois Child Outcomes Rating Scale and Summary Data Collection. The Student’s name, date of birth and ID number should auto fill.

**ILLINOIS CHILD OUTCOMES RATING SCALE AND SUMMARY DATA COLLECTION**

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Test Date</th>
<th>DOB</th>
<th>Student Id</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Double click on the blue **District #**.

Click on **Location** to state where the child is receiving the special education services.

Click on the **Date** to fill in the meeting date.

Double click on **Gender**.

As well as **Race**.

Then fill in the appropriate Rating and

**1st Rating (Entry).** If this is the first time the student has been rated, enter your rating into the center column. In the last column, write in the Outcome Indicator that you choose, either "a1" or "c".

<table>
<thead>
<tr>
<th>Child Outcome Area</th>
<th>Overall Summary Rating (from scale, 1-7)</th>
<th>Outcome Indicator (Write in &quot;a1&quot; or &quot;c&quot;)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive Social Relationships</td>
<td>Rating</td>
<td>Rating</td>
</tr>
<tr>
<td>Acquiring and Using Knowledge and Skills</td>
<td>Rating</td>
<td>Rating</td>
</tr>
<tr>
<td>Taking Appropriate Action to Meet Own Needs</td>
<td>Rating</td>
<td>Rating</td>
</tr>
</tbody>
</table>

*(Reminder of Rules for Outcome Indicators for 1st Rating: "a1" = a rating of 7; "c" = a rating of 1-6)*

The same process is done on the bottom.

**2nd or Later Rating.** If the student has been rated previously, enter the rating from the previous rating (2nd column) and the rating from the current rating (3rd column). In the last column, write in the Outcome Indicator that you choose, either "a1", "a2", "b1", "b2", or "c", onto the space beside each Child Outcome Area below.

<table>
<thead>
<tr>
<th>Child Outcome Area</th>
<th>Previous Overall Summary Rating* (from scale, 1-7)</th>
<th>Current Overall Summary Rating (from scale, 1-7)</th>
<th>Outcome Indicator (Write in &quot;a1&quot;, &quot;a2&quot;, &quot;b1&quot;, &quot;b2&quot;, or &quot;c&quot;)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive Social Relationships</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
</tr>
<tr>
<td>Acquiring and Using Knowledge and Skills</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
</tr>
<tr>
<td>Taking Appropriate Action to Meet Own Needs</td>
<td>Rating</td>
<td>Rating</td>
<td>Rating</td>
</tr>
</tbody>
</table>

*(Reminder of Rules for Outcome Indicators for 2nd and Later Ratings: "a1" = child maintained a rating of 7; "a2" = child achieved a rating of 7; "b1" = child achieved a higher rating than last time, but did not yet achieve a 7; "b2" = child needs observable progress but not enough to change ratings; "c" = child received the same rating as last time in this area but not 7)*

* most recent rating prior to this one (entry rating, intermediate rating)
Placement

IEP Education Program: Information

IEP Case Manager/Specialist’s Expectations

Responsibilities-Case Manager

- Ensure that student is receiving all services as stated on IEP.
- Relate relevant information including accommodations and adaptations in IEP to regular education teacher and all staff members in contact with student.
- Write and implement IEP.
- Facilitate annual IEP meeting or any additional required meetings.
- Ensure progress reports are completed at grading periods by all relevant personnel and sent home to parent/guardian.
- Be aware if reevaluation is needed and coordinate dates with psychologist.
- Ensure IEPs are scheduled before or on the student’s anniversary date (if student has an Annual Review date and Reevaluation in the same school year-use date of which comes first).
- Coordinate IEP dates/calendar with IEP team members.
- Ensure implementation of FBA/BIP.
- Collect and analyze data to monitor goals/objectives.

12 weeks before meeting

- Contact Renee Lambert by email for all students who will be turning 14 ½ or older during the course of the IEP to begin the process of creating a Secondary Transition plan that aligns with our IEP documents.

6 to 4 weeks before meeting:

- Check student’s IEP for related services and inform team members of upcoming meeting.
- Begin appropriate tests, review records, interviews, observations, checklists, CBMs, etc for accurate assessment of present level data.
- Contact school nurse.

3 to 2 weeks before meeting:

- Arrange IEP meeting date and time with parent(s.)
Mail Procedural Safeguards and Notification of Conference (for Reevaluations, Manifestation Determinations, IEP revise and revise, Annual IEPs, etc.) to parent/guardian.

Dialogue with Renee Lambert to determine if her participation is warranted at the IEP meeting. If so, include her name on the Notification of Conference and distribute.

Distribute copies of conference notification to ALL IEP team members – include as appropriate (Remember – if student is not receiving a service, that provider should NOT be invited to meeting):

- Building Principal (or LEA designee)
- Special Education Coordinator/Specialists
- Regular Education Teacher
- Social Worker
- Speech/Language Pathologist
- OT/PT
- Nurse
- Hearing Itinerant
- Vision Itinerant
- Transition Specialist
- Psychologist
- Parent/Guardian
- Sign Language Interpreter
- Student
- Language Liaison
- Advocate/Person knowledgeable of student by parent/guardian request

Start writing IEP

Do NOT include Placement or Education Services on the DRAFT IEP until the IEP meeting and the Team come to consensus.

Request language liaison and/or sign language interpreter as needed - ensure IEP date works with the Language Liaison’s schedule. IEP meetings requiring a sign language interpreter should be scheduled no later than 8:00 AM for morning IEPs and no earlier than 2:00 PM for afternoon IEPs whenever possible. Contact Joan Guilianelli to request a sign language interpreter.

IEP

Use IEP procedures to start an annual review.

For an addendum, contact your coordinator/specialists.
☐ Complete all pages of the IEP and/or other documents that pertain to the services you provide.

**DO NOT** change anything entered by another person (put your domain areas, name and title by any entries you make the present level sections).

☐ Goals should match student’s educational needs.

**IF** student will be 14 ½ before the next IEP convenes, complete a secondary transition and transition plan – update and revise secondary transition and transition plans if student is older than 14.

☐ Check if student has a Behavior Intervention Plan (BIP), update and revise as necessary. Make sure a student has a Functional Behavior Assessment (FBA) if writing a BIP for the first time.

☐ Proof read all entries for complete sentences, correct grammar, punctuation and spelling.

☐ **Send home DRAFT IEP with DRAFT IEP memo.**

**Week before meeting**

☐ Call parent/guardian to confirm attendance (must document 3 attempts to involve parents before day of IEP with 3 different contact dates).

☐ Send list of contacts to parent mentors to assist in reminding parent/guardian.

**Day of meeting**

☐ Bring all pertinent information to meeting regarding student’s progress.

☐ Bring draft copy of IEP to meeting.

☐ Complete IEP and other documents. Make changes as needed based on team’s discussion.
   - Notification of Conference
   - Notification of Conference Recommendations
   - Behavioral pages
   - Excusal of IEP Team Members
   - Age of Majority
   - Delegation of Rights to Make Educational Decisions
   - Parent Consent for Billing Public Insurance
   - IEP Amendment
   - IEP
   - Receipt of Procedural Safeguards
Gather all documentation (e.g. Notice, Consent, & Eligibility forms) from the psychologist (e.g. Initial and Reevaluation meetings).

Write Central File and CIMS number on ALL documents.

Give organized original documents to the Specialist.

Inform Specialist of any services/programs changed compared to the previous IEP (view Program Change form for details and/or complete Program Change form based on changes to the IEP).

Specify to the Specialist if documents are missing due to draft changes.
  - Make needed changes for IEP to be complete.

After Meeting

Place IEP document in Temporary Folder inside the Cum Folder.

Give /mail/send with student the IEP document to parent/guardian.

One Week Before/End of Every Grading Period

A progress report MUST be sent home for each grading period.

Print Progress Report from Legacy documents. Write updated progress notes as you would if typed for each grading period until a new IEP is developed with the new IEP pages.

Update progress toward goals

Ensure that any related service provider has updated progress toward their goals one week before grading period.

Print out progress report and send copy with report card. Middle and High School level case manages mail Progress Reports. Progress reports should NOT be printed out before the last day of grading period!

Responsibilities-Specialist

End of IEP meeting or within two days of IEP meeting

- Make sure all documents are in correct order by using IEP Audit checklist.

- If not in correct order, organize all document pages.

- Contact Team Members who are missing document
- Review content of documents (e.g., Program Change form, missing dates or missing Purpose of meeting.)

- Write Central File and CIMS number on ALL documents.

- Inform Case Managers to correct documents if needed

- Finalize documents

- Organize all original documents according to the IEP Audit checklist
  - Notification of Conference
  - Notification of Conference Recommendations
  - Behavioral pages
  - Exculs of IEP Team Members
  - Delegation of Rights to Make Educational Decisions
  - Parent Consent for Billing Public Insurance
  - Age of Majority
  - IEP Amendment
  - IEP
  - Receipt of Procedural Safeguards

- Give parent/Guardian final IEP. If DRAFT IEP needs modifications, write needed changes and when parent/guardian will receive final IEP on the Additional Notes page of the IEP.

- Mail final IEP to the parent/guardian

- Review/Update Program Change form as needed

- Mail the Parent Consent for billing Public Insurance document to Verna Reyes at Lincoln Center.

- Send copy of Program Change Form for grades K-8 to Leslie Vanderventer, Lincoln Center Rm. 202.

- Make 2 copies of original IEP document (Parent, Temporary folder inside Cum Folder.

- Disseminate copies to parent/guardian and place in Temporary Folder inside Cum Folder.

- Send original copy to Central File.
**Continuum of Services**

IDEIA regulations require that children be provided education in the least restrictive environment. Each public agency must ensure:
1. To the maximum extent appropriate, children with disabilities are educated with children who are non disabled; and
2. Removal of children from the regular education environment occurs only if the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.

<table>
<thead>
<tr>
<th>Fully Included with Consult From the Spec. Ed teacher</th>
<th>Inclusion 100% of the day in general education</th>
<th>Resource Services 40-79% of the day in general education classroom.</th>
<th>Instructional Services less than 21% in general education environment Grade Level Curriculum</th>
<th>Instructional Services (less than 21% of the day or less in the general education environment. Intensive Intervention/Replacement Curriculum</th>
<th>Instructional Services (21% of the day or less in the general education environment. Functional Curriculum</th>
<th>Residential/ Private Day Alternative placements 21% of the day or less in the general education environment.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>• Core Curriculum is utilized.</strong></td>
<td><strong>• Able to manage the general ed. core curriculum but requires concept review</strong></td>
<td><strong>• May be able to manage general ed. Core curriculum, but requires strategic instruction such as pre-teaching of concepts, test preparation, etc.</strong></td>
<td><strong>• Able to manage in general ed. curriculum but needs to be instructed in smaller groups and/or at a slower pace</strong></td>
<td><strong>• Lack of adequate progress in the general ed curriculum</strong></td>
<td><strong>• Lack of adequate progress in the general ed curriculum with supplementary aids and services</strong></td>
<td><strong>• These placements are sought when it has been adequately demonstrated that the student's needs cannot be met in one of the Waukegan Public Schools' programs, and only after a variety of other interventions have been considered and/or tried</strong></td>
</tr>
<tr>
<td><strong>• Very mild needs</strong></td>
<td><strong>• Co-teaching maybe a model of instruction.</strong></td>
<td><strong>• May be utilizing intensive intervention for subject area such as reading or math.</strong></td>
<td><strong>• Core components and essential skills of the general ed curriculum are covered</strong></td>
<td><strong>• Requires more explicit form of instruction</strong></td>
<td><strong>• Lack of adequate progress with an intensive intervention/replacement curriculum</strong></td>
<td><strong>• These placements are sought when it has been adequately demonstrated that the student's needs cannot be met in one of the Waukegan Public Schools' programs, and only after a variety of other interventions have been considered and/or tried</strong></td>
</tr>
<tr>
<td><strong>• Close to exiting the program</strong></td>
<td><strong>• Appropriate accommodation and modifications are provided.</strong></td>
<td><strong>• Resource focuses on specific goals and instructional areas</strong></td>
<td><strong>• Student may need specific behavior management strategies or goals.</strong></td>
<td><strong>• Working more than two grade levels behind</strong></td>
<td><strong>• Working below the 10% in DIBELS or Aimsweb measures</strong></td>
<td><strong>• These placements are sought when it has been adequately demonstrated that the student's needs cannot be met in one of the Waukegan Public Schools' programs, and only after a variety of other interventions have been considered and/or tried</strong></td>
</tr>
<tr>
<td><strong>• General ed. program is appropriate with minimal modifications/ accommodation</strong></td>
<td><strong>• Instructional Services (less than 21% of the day or less in the general education environment. Functional Curriculum</strong></td>
<td><strong>• Instructional Services (21% of the day or less in the general education environment. Functional Curriculum</strong></td>
<td><strong>• Other assessments show lack of progress compared to peers</strong></td>
<td><strong>• Working below the 10% in DIBELS or Aimsweb measures</strong></td>
<td><strong>• Other assessments show lack of progress compared to peers</strong></td>
<td><strong>• These placements are sought when it has been adequately demonstrated that the student's needs cannot be met in one of the Waukegan Public Schools' programs, and only after a variety of other interventions have been considered and/or tried</strong></td>
</tr>
</tbody>
</table>
The IEP Process “Cliff Notes”

Getting Started . . . Have you . . .

Updated Student Demographics?
(CF #, address, phone #)

YES

NO

See TERA Manual: Update Demographics

Updated Student Contacts?
(Parents, Reg. Ed. Teacher, Counselor)

YES

NO

See TERA Manual: Update Student Contacts.

Set up IEP Team Members?
(If this is done correctly it will auto-fill in your participants)

YES

NO

See TERA Manual: Team Members

Starting an IEP Document
"SAVE AS" Manual
Coordinators/Specialists Only

The save as feature in TERA creates a copy of the current IEP to be edited and drafted for the new IEP. Refer to SAVE AS guidelines for how to edit the IEP copy in TERA. Note: Only Coordinators and Specialists have access to a “save as.”

Steps to create a “Save as” copy of the final IEP:

Step 1: From the Student Explorer, click on Documents->Explorer in the menu bar

This will bring up the list of all the documents in TERA.

Step 2: Highlight “Individualized Education Program.” Click File->Save As:

A new table will open.

Step 3: Save As - Update new records.

Check the black box next to services if you want the services to transfer over.
Check the black box next to Team Members if you want the Team Members to transfer over.

Enter a new IEP start date and new end date by clicking on the calendar.
Step 4: A copy is successfully completed.

Click OK.

On the left side that lists all the IEP documents will have a Copy of the previous final IEP with IN PROGRESS status:

<table>
<thead>
<tr>
<th>Created By</th>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wais, Janet</td>
<td>08/29/2006</td>
<td>In Progress</td>
</tr>
<tr>
<td>Wais, Janet</td>
<td>08/29/2006</td>
<td>Final</td>
</tr>
</tbody>
</table>

Highlight the In Progress IEP and click EDIT.
Individual Education Program (IEP)

Conference Summary Report (Top of Form)

This screen shows student IEP dates, purpose of conference, identification information, parent/guardian information, meetings participants, and explanation of procedural safeguards. Be sure to change any of the information in the blue memo boxes that is incorrect or incomplete. Please note that demographic information needs to be changed through the building secretary and reloaded onto the Tera document.

Step 1: Are the CIMS & CF #s correct for this student?

- **YES**
- **NO**

Go back to student demographics and enter the info. Note: Remember to reload the template.

Step 2: Conference Purpose
Double Click on the blue memo and choose the purpose of the conference.

Step 3: Student Identification Information/Parent/Guardian Information: Double-check all of the automatically filled in information for accuracy. Put in all the necessary dates. If the information is incorrect double click on the blue words to change the information. Check for Date of birth, gender, grade, language mode, school, future school, primary disability, secondary disability, ethnicity and all parent information. Please make sure CIMS information is correct that dumps into this section.
Step 4: Conference Participants:
Check appropriate boxes to indicate which meetings were attended. Anyone serving in a dual role should indicate so on the following lines. If a required participant participates through written input or is excused from all or part of the IEP meeting, the required excusal and written report, as necessary, is attached.

If the parent(s) did not attend the meeting, indicate what attempts were made to arrange a mutually agreed upon time and place (e.g., telephone calls, written correspondence).

Participants should auto-fill, if the IEP Team Members were set up before opening your IEP Document and a new IEP was created.
To add a participant not listed: double click the blue down arrow (located in the upper right corner of the participants). This will add a participant; double click and change the blue name and blue role.
To delete a participant, double click on the blue x box located at the end of the row for that person and role.

Step 5: Procedural Safeguards:
Indicate when the Explanation of Procedural Safeguards were provided to/reviewed with the parent(s).
Check the boxes to indicate if the student was informed of his/her rights that will transfer to the student upon reaching the age of majority.

Use the boxes to indicate if the parents received copies of the necessary special education documents. If a parent did not attend the meeting, the district should mail any required document(s) to the parents. Although not required, it is recommended that the IEP Conference Summary Report indicate that the documents (s) were mailed to the parent(s).

Secondary Transition

The IEP team must address transition services for the IEP that will be in effect when the student is 14 ½. Transition services should include appropriate, measurable post-secondary goals that are based on age-appropriate transition assessments. The IEP team may address a particular section(s) before the age listed, if the team has determined that transition assessments, goals, supports, or services should be addressed. Any area addressed should be based on the student’s needs, taking into account the student’s strengths, preferences and interests.

Step 1: Age-Appropriate Transition Assessments
Identify as appropriate the type of assessment(s) with the responsible person, date conducted, and whether or not the report is or will be attached and a cross-reference to relevant post-secondary outcomes and annual IEP goals. Double click on Type, Agency, Date and Goal# to select from the drop down menu. Double click to add a check in the box.

Step 2: Post-Secondary Outcomes/Goals
Identify the student’s post-secondary goals in the areas of employment, education, training, and when applicable independent living. Enter a goal for each of the areas by double clicking on the blue memo and choose the goal(s) from the drop down menu or type your own goal. Double click and select from the drop downs as it relates to employment, education, training, and/or independent living.
Step 3: Course of Study
Identify a course of study that is a long-range educational plan or multi-year description of the educational program that directly relates to the student's anticipated post-school goals, preferences and interest as listed described above. Course of study includes required, elective, advanced placement or special designed instruction and could include educational experiences in the community. Double click on the blue memo and select appropriate courses as it relates to the student's post-secondary goals.

Step 4: Transition Services
Identify any supports and/or services needed in the areas of instruction, related services, community experiences, the development of employment and other post-school adult living objectives, and if appropriate acquisition of daily living skills and provision of a functional vocation evaluation. Also, indicate the agency and position response for providing the supports/services and if appropriate, the corresponding annual IEP goal number. Double click on the blue memo and list the necessary supports and/or services. For each area, double click on Agency and Position to select from the drop down menu. Double click on Date and Goal #s to select as determined by the team.
Step 5: Home-Based Support Services

Complete this section only for students who may fall under the category of developmentally disabled and who may become eligible for the Home-Based Support Services Program after they reach age 18 and no longer receive special education services. The program allows adults to purchase goals and services related to their disability. To participate, the individual must be eligible for federal Supplemental Security Income (SSI) or Social Security Disability Income (SSDI). Double click on the blue memo and type your narrative statement as it relates to the three qualifying areas.

<table>
<thead>
<tr>
<th>TRANSITION SERVICES</th>
<th></th>
</tr>
</thead>
</table>
| **INSTRUCTION** (e.g., tutoring, skills training, prep for college entrance exams, screen remediation, adult basic ed) | Provide Agency and Position Agency Position
Goal # if appropriate
Date/Year to be Addressed Date
Date/Year Completed Date |
| **RELATIVE SERVICES** (e.g., transportation, social services, medical services, technology support services) | Provide Agency and Position Agency Position
Goal # if appropriate
Date/Year to be Addressed Date
Date/Year Completed Date |
| **COMMUNITY EXPERIENCES** (e.g., job shadow, work experience, banking, shopping, transportation, tours of post-secondary settings) | Provide Agency and Position Agency Position
Goal # if appropriate
Date/Year to be Addressed Date
Date/Year Completed Date |
| **DEVELOPMENT OF EMPLOYMENT AND OTHER POST-SCHOOL ADULT LIVING OBJECTIVES** (e.g., career planning, guidance counseling, job training, registered to vote, skills benefits planning) | Provide Agency and Position Agency Position
Goal # if appropriate
Date/Year to be Addressed Date
Date/Year Completed Date |
| **APPROPRIATE ACQUISITION OF DAILY LIVING SKILLS AND/OR FUNCTIONAL VOCATIONAL EVALUATION** (e.g., self care, home repair, home health, money, independent living, job and career interests, aptitudes and skills) | Provider Agency and Position Agency Position
Goal # if appropriate
Date/Year to be Addressed Date
Date/Year Completed Date |
| **LINKAGES TO AFTER GRADUATION SUPPORT/SERVICES** (e.g., ESOL, DLM, DSECC, PAS, SASS, SS, WC, CHSSC, CO) | Provider Agency and Position Agency Position
Goal # if appropriate
Date/Year to be Addressed Date
Date/Year Completed Date |

**HOME BASED SUPPORT SERVICES PROGRAM**

- **Yes**
- **No**

The student has a developmental disability and may become eligible for the program after reaching age 18 and when no longer receiving special education services.

If you complete the following statements:

- Plans for determining the student's eligibility for home-based services:
- **Memo**

- Plans for enrolling student in the program of home-based services:
- **Memo**

- Plans for developing a plan for the student's most effective use of home-based services after reaching age 18 and when no longer receiving special education services:
- **Memo**

5.77
Present Levels of Academic Achievement And Functional Performance

This page is completed for all initial IEPs and annual reviews. You must include ALL areas that are impacted by the student’s disability(s). The present levels should be descriptive statements addressing both areas (academic as well as functional) and showing a relationship to the Illinois Learning Standards. There must be a direct correlation between the:

- Academic achievement and functional performance
- Development of the goals and objective benchmarks, and
- Provision of specific special education and related services.

The student’s Name, Date of Birth and Date of Meeting will auto fill from the first page.

For each section, click on the blue “memo” and a pop-up window will appear, the top of the box will tell you which section you are in. The tool bar at the top of each memo box provides additional aids to report the information: insert file, insert picture, insert table, and insert standard template.

Here is an example of the memo pop-up window:
The first section to fill out is:

Student’s Strengths

In this section, compose a narrative describing the student’s academic and functional strengths.

Then,

Parental Educational Concerns/Input

In this memo box, you document any parental concerns and input regarding their child’s education expressed during the meeting.

Third,

Student’s Present Level of Academic Achievement (Include strengths and areas needing improvement)

Present levels of academic achievement refer to how a student is performing within the general education curriculum (e.g., completes assignments on time, adds and subtracts two-digit numbers, able to complete an assignment using a specified supplementary aid, etc.) For preschoolers, performance levels may include pre-academic readiness skills and developmentally appropriate cognitive skills. Documentation should reflect the results of the most recent evaluation, but should not be a restatement of the evaluation results documented in the eligibility report.

Fourth,

Student’s Present Level of Functional Performance (Include strengths and areas needing improvement)

Functional performance is related to activities associated with daily living (e.g., behavioral deficits, social/emotional, independent functioning, vocational, motor skills). This information should be stated in clear, concrete terms understandable to all IEP team participants. Again, documentation should reflect the results of the most recent evaluation, but should not be a restatement of the evaluation results documented in the eligibility report. For students 14 ½ and older, describe student strengths and weaknesses within the context of his/her post-school goals.

Finally,

Describe the effect of this individual’s disability on involvement and progress in the general education curriculum and the functional implications of the student’s skills.

- For a preschool child, describe the effect of this individual’s disability on involvement in appropriate activities.

- By age 14 ½, describe the effect of this individual’s disability on the pursuit of post-secondary expectations (living, learning, and working).
Here is where you document the determination of how the child’s disability affects the child’s involvement and progress in the general education curriculum. This directly corresponds with the provision that requires the IEP to include measurable annual goals designed to meet the child’s needs that result from the child’s disability. (Previously known as “educational needs” on previous IEPs).

**Data Chart (Optional)**

Included on the IEP document is a page dedicated for inserting different types of data charts. A data chart is a document that contains information about a student’s academic and/or behavioral progress toward his or her IEP goals. You can create your own data chart using Excel, Word, or another computer application. You can also download a data chart from other sources such as AIMSWEB, SWIS, or other Internet applications. Excellent documents to download onto the data chart page include progress-monitoring data, benchmarking scores, SWIS charts, etc. Below illustrates an example of how to download a student’s benchmarking scores from AIMSWEB using a Mac and PC.

**Mac Directions**

1. Log onto AIMSWEB (www.aimsweb.com) and go to the student’s benchmarking graph.
2. Once you have found the graph that you are looking for, Click shift+apple+4 to change the cursor from an arrow to a +.
3. Using the + cursor, highlight the area that you would like to take a picture of to download onto TERA. It is easier to use a mouse when completing this task, although it is not required.
4. Then, once you have highlighted the graph you want placed in TERA, the computer will automatically take a “snapshot” and place a copy of the picture onto the Desktop. The cursor should return to the arrow from the +.
5. If the picture was too big to fit on the screen, you may have to take multiple pictures. For each picture, you will have to change the cursor using the shift+apple+4 function. You can place the pictures one after the other into TERA so the document looks like one picture when you print the IEP, Documentation of Evaluation Results, etc.
6. For each picture you take from the internet screen, it will copy onto the Desktop as “Picture 1”, “Picture 2”, etc.
7. Open “Picture 1” by double clicking on the icon on the Desktop.
8. Then go to “Edit” and click on “Copy”.

![Picture 1.png](Picture 1.png)
9. Log onto TERA and open up your student’s IEP.
10. Within the IEP, go to the Data Chart section of the IEP.

11. Click on the MEMO link.

REPORT OF PERFORMANCE (READING, WRITING, MATH)

Insert a data chart that displays the student’s performance in reading, writing, and/or math relative to his/her peer group. Data charts may be provided for other areas, as well.
12. In the Memo Box, click the Paste button to paste your chart into the Memo Box.

13. Your picture may appear to be either expanded or too large for the box. How the picture looks within the Memo Box will be how it appears in the IEP. If the picture is too large or expanded, scroll down to the top left corner of the picture. Click on the picture and a small square will appear. Click on the square and drag the box diagonally toward the top left of the computer. Keep dragging the picture until the picture is the size you would like it to be.

14. Once the picture is in the memo box and is an appropriate size, click “OK” to close the Memo Box.
15. You may add multiple data charts on the page. To add another data chart, please click “Add” to have another Memo Box appear.

16. If you are pasting a data chart into the Documentation of Evaluation results or another TERA document, follow the same Memo Box directions (#11-#14) as stated above.

17. In addition, after you click “OK” to close the Memo Box, a box may appear stating to “Please Enter Text”.

DATA CHART
(OPTIONAL)

Student Name: Twenty Bird
Date of Birth: 12/02/92
Date of Meeting: 09/11/08

REPORT OF PERFORMANCE (READING, WRITING, MATH)

Insert a data chart that displays the student’s performance in reading, writing, and/or math relative to his/her peer group. Data charts may be provided for other areas, as well.

REPORT OF PERFORMANCE
(INsert DATA CHART)

Early Lit. Improvement Report for 2008-2009 School Year

Benchmark Comparisons: CLEBURNE ELEMENTARY

Student Name | Year | Grade | Fall | Winter | Spring | Level of Goal | Instructional Recommendation
---|---|---|---|---|---|---|---
CLEBURNE 2007 | 2007 | 1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0
If this box appears, please click “OK”, go to the top of the Memo Bank screen, and type in any text that corresponds with the data chart.

18. Please remember to “Save” your work!

**PC Directions**

1. Log onto AIMSWEB ([www.aimsweb.com](http://www.aimsweb.com)) and go to the page where your student’s benchmarking scores are.
2. Highlight the graph that has the benchmarking scores.
3. Go to “Edit” and click “Copy”.
4. Open Microsoft Word.
5. Paste the data chart into a Word document.
6. Open TERA and go to your student’s IEP, Documentation of Evaluation Results, etc.
7. Go back to the Word document and highlight the data chart. Then go to “Edit” and click “Copy”.
8. Go back to the IEP. Within the IEP, go to the Data Chart section of the IEP.

9. Click on the MEMO link.

**REPORT OF PERFORMANCE (READING, WRITING, MATH)**

Insert a data chart that displays the student’s performance in reading, writing, and/or math relative to his/her peer group. Data charts may be provided for other areas, as well.

10. In the Memo Box, click the Paste button to paste your chart into the Memo Box.
11. Your picture may appear to be either expanded or too large for the box. How the picture looks within the Memo Box will be how it appears in the IEP. If the picture is too large or expanded, scroll down to the top left corner of the picture. Click on the picture and a small square will appear. Click on the square and drag the box diagonally toward the top left of the computer. Keep dragging the picture until the picture is the size you would like it to be.

12. Once the picture is in the memo box and is an appropriate size, click “OK” to close the Memo Box.
13. You may add multiple data charts on the page. To add another data chart, please click “Add” to have another Memo Box appear.

DATA CHART
(OPTIONAL)

Student Name: [Terry Bird] Date of Birth: 12/02/92 Date of Meeting: 09/11/08

REPORT OF PERFORMANCE (READING, WRITING, MATH)

Insert a data chart that displays the student’s performance in reading, writing, and/or math relative to his/her peer group. Data charts may be provided for other areas, as well.

REPORT OF PERFORMANCE (INSERT DATA CHART)

14. If you are pasting a data chart into the Documentation of Evaluation results or another TERA document, follow the same Memo Box directions (#11-#14) as stated above.

15. In addition, after you click “OK” to close the Memo Box, a box may appear stating to “Please Enter Text”. 
If this box appears, please click “OK”, go to the top of the Memo Bank screen, and type in any text that corresponds with the data chart.

16. Please remember to “Save” your work!

Goals and Objectives/Benchmarks

Step 1: The screen will be yellow (administrator) or blue (teacher) if no goals have been entered. Double click on the add/delete goal button.

Step 2: The Goals and Objective Dialog Box appears.

Click on new.

A menu will appear. Choose Add from “Code file-New Instructional Area.”

Step 3: Choose Instructional Area: The goal tree (hierarchy) will appear; listing all the instructional areas. Choose an area by clicking on (or by double-clicking on the area title). Drag the area title (ex: Elementary Academic) to the “Selected Instructional Areas” to the right. (If drag and drop is not working for you, you can click.)

Step 4: Choose a Goal: Choose a goal by clicking on (or by double-clicking on the goal title). Drag the goal title (ex: Mathematics: Describe Patterns Using Algebraic ...) to the “Selected Goals” to the
right. (If drag and drop is not working for you, you can click ...)

Note: You can also create a custom goal by clicking “New” and “Add Manually.” (See the Appendix.)

Step 5: Choose an Objective; Choose an objective by double-clicking on it. The objective should appear in the “Selected Objectives” on the right. (If double-clicking is not working for you, you can click ...)

Step 6: Adding Multiple Goals. Select and highlight the next goal, drag it to the right box called selected goals or use the arrow button ... Add the objectives for the new goal the same way as explained above.
Step 7: When you are done, click the save button [✓]. You will see the list of all the instructional areas, goals and objectives if you click the [+] .

Click exit [×].

Step 8: Replace Name with student’s name: Click “Replace All.”

All the goals and objectives are now in the goal document, which is now white and the different sections can be edited.
Section 1:

GOALS AND OBJECTIVES/BENCHMARKS

Complete for initial IEPs and annual reviews. (Anyone responsible for implementing the IEP (e.g., goals and objectives/benchmarks, accommodations, modifications and supports) must be notified of her/his specific responsibilities.)

REPORTING ON GOALS

The progress on annual goals will be measured by the short-term objectives/benchmarks. Check the methods that will be used to notify parent of the student’s progress on annual goals and if the progress is sufficient to achieve the goals by the end of the IEP year:

☐ Report Cards ☐ Progress Reports ☐ Parent conference ☐ Other (specify): Text

In this section, the student’s name, ID, Grade and the Date of the meeting carry over from the first page. There is an automatic check mark in the box by Progress Reports, which is the standard time frame that we use to report progress. If you are going to use any of the other ways, you may check those off as well, but you MUST do the progress report section as well.

Section 2:

CURRENT ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE

Instructional Area: Memo: Speech Language

Result of the initial or most recent evaluation and result on district-wide assessments relevant to this goal; performance in comparison to general education peers’ and standards.

Instructional Area: Memo: Speech Language

The instructional area will auto fill from your creating the goals.

Under the Instructional Area, there is a memo box Memo that when double clicked will produce the following memo box:

The top portion contains a drop down box in which to select the appropriate area of performance being documented here.
Once you choose the correct area, click on the blue down arrow to put it into the memo box. Then you can provide a narration that references the previous Present Levels of Academic Achievement and Functional Performance section of the IEP (3rd section). You should include a brief statement of the academic or functional performance deficit that is to be addressed by the annual goal and objectives/benchmarks. For student’s 14½ and older, describe student’s strengths and weaknesses within the context of his/her post-school goals.

In the next section:

**GOALS AND OBJECTIVES/BENCHMARKS**

The goals and short-term objectives and benchmarks shall meet the student’s educational needs that result from the student’s disability, including involvement in and progress in the general curriculum, or for the preschool student, participation in appropriate activities.

Goal Statement # 1 **Memo**

Discriminate and produce age appropriate sounds within classroom/school environment to listen and speak effectively and clearly.

Indicate Goal Area: **Type**

Illinois Learning Standard: **Memo**

**The Goal Statement**

Goal Statement # 1 **Memo** Discriminate and produce age appropriate sounds within classroom/school environment to listen and speak effectively and clearly.

Indicate Goal Area: **Type** Double click on the **Type** Choose the appropriate type to indicate whether the goal is academic or functional in nature, or if it is related the student’s transition needs. The team should also indicate the Illinois Learning Standard: **Memo** by double clicking on this blue **Memo** and writing in the appropriate standard that fits the goal.

Next is the Title(s) of Goal Implementer(s): **Title**

If you do not see the correct implementer, you can type in your own on the bottom half. You can choose more than one implementer for this section, as you double click on each one, they will fall into the bottom section:

And then appear on the Goals page when you click on **OK**

Title(s) of Goal Implementer(s): Language Liaison, Speech & Language Pathologist, Teacher
For each objective/benchmark that you chose, you'll have a section that looks like this:

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Evaluation Procedures</th>
<th>Schedule for Determining Progress</th>
<th>Dates Reviewed/Extent of Progress (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Procedure</td>
<td>Schedule</td>
<td></td>
</tr>
</tbody>
</table>

The objective will auto fill, but you need to fill in the bottom four portions.

**Evaluation Criteria**

The drop down [Image] provides a drop down when you double click [Criteria] to get the following;

Click on the down arrow of the top portion

[Image]

and the following codes appear. Double click on the criteria you choose.

Again, if you don’t see what you are looking for, type in your own at the bottom:

[Image]

Follow the same procedure for **Evaluation Procedures**, clicking on [Procedure]. You can choose as many of the methods you deem necessary and appropriate and they will fall into the bottom section to appear on the goal page when you click on the ok.

**Schedule for Determining Progress**

Next click on [Schedule]. Choose what is appropriate for that particular objective.
The last section: **Memo** is optional. According to ISBE, you can use this progress box to note when the objectives are reviewed and the student’s progress at the time of review.

You will complete this entire process for each Goal area and Objectives that you write.

**To ADD an Additional Goal:** If you want to add an additional goal, after you have already entered one, click the add/delete goal button.
Repeat above steps.
Click the save button
Click exit

**To Edit a Goal:** If you want to edit a goal, click the add/delete goal button.
Highlight the goal you want to edit:

![Middle School Academic](image)

Click edit: Type in any changes to the goal.
Click save:

**To Delete a Goal:** If you want to delete a goal, click the add/delete goal button.
Click the next to the academic area.
Highlight the goal you want to delete.
Click the delete button: Click yes to delete the goal.

**To Delete an Objective:**
Click the next to the goal.
Highlight the objective you want to delete.
Click the delete button: Click yes to delete the objective.
Creating Your Own Goals & Objectives

To make your own goals & objectives:

1. Click on the blank paper icon next to the blue find goal drop down menu. Then, click on the blank paper icon, choose add manually instructional area. The following popup screen will appear. You type your instructional area on the right blank paper side, then click on the save icon.

2. Go back to blank paper icon, choose add manually goal. Again, type your goal on the right hand side and save. Repeat for more than one goal.

3. Go back to blank paper icon, choose add manually objective. Type your objective on the right hand side and save. Repeat for as many objectives as you want.

4. When all your requirements are finished, and you have saved, click on the green “exit” door.

If you can use the goal bank for the instructional area and goal, do so. Then you highlight the goal area on the left side, go to blank paper and choose add manually objective. Type in your objective and save.
Educational Accommodations and Supports

Complete this page for initial IEPs and annual reviews. (Anyone responsible for implementing the educational accommodations must be informed of his/her specific responsibilities.)

The top portion of this page is auto-filled:

EDUCATIONAL ACCOMMODATIONS AND SUPPORTS

Student Name: School District		Date of Birth: 11/22/93		Date of Meeting: 01/15/93

Complete for initial IEP and annual reviews. (Anyone responsible for implementing the educational accommodations must be notified of her/his specific responsibilities).

The next section deals with Transition:

<table>
<thead>
<tr>
<th>TRANSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Yes</td>
</tr>
</tbody>
</table>

- Consideration of service needs, goals, and support services is required (by age 14 1/2, the team must address transition service needs). If yes, complete the “Transition Services” section of the IEP.

- Consideration of “Home-Based Support Services Program for Mentally Disabled Adults” for eighteen-year-old student is required. If yes, complete the “Home-Based Support Services Program” section of the IEP.

Check the boxes to indicate if the team must consider transition services, including assessment, post-secondary goals, course of study, services/supports and/or Home-Based Support Services Program for Mentally Disabled Adults. For any box checked “yes,” you must complete the appropriate section(s) of the “Transition Services” pages of the IEP. To check a box, double click within the boxed area.

Third is the consideration of Special Factors:

<table>
<thead>
<tr>
<th>CONSIDERATION OF SPECIAL FACTORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Yes</td>
</tr>
</tbody>
</table>

Check the boxes to indicate if the student requires any supplementary aids and/or services due to the following factors. For any box checked “yes,” specify the special factors in the “Supplementary Aids, Accommodations and Modifications” section listed below.

- □ Yes | □ No | all students - assistive technology devices and services
- □ Yes | □ No | all students - communication needs
- □ Yes | □ No | deaf/hard of hearing - language and communication needs
- □ Yes | □ No | limited English proficiency - language needs
- □ Yes | □ No | blind or visually impaired - provision of Braille instruction
- □ Yes | □ No | behavioral or emotional impairment - problem solving strategies to address behavior

In this section, use the boxes to indicate which, if any, special factors apply to the student and must be addressed in the IEP. If any box is checked yes, the team MUST document in the “Supplementary Aids, Accommodations, and Modifications” section what aids and/or services will be provided.
Fourth, Linguistic and Cultural Accommodations:

In this section, use the first set of boxes to indicate if the student has any special accommodations due to his/her linguistic and/or cultural needs. If you check the yes, then you will double click on the blue link to open the following drop down menu:

Double click on the appropriate code(s) (you can choose more than one)

The selected accommodation(s) will drop the description into the bottom portion:

Once this is completed, click on the and it will appear on the IEP page.

If there is an accommodation that requires the provision of special education and related services in a language or mode of communication other than or in addition to English, double click on the second link to choose from the drop down.

Next is Supplementary Aids, Accommodations, and Modifications.
In this section, you will double click on the “Accommodations” link Accommodations in order to choose from the following list of accommodations. It is in this manner that you will indicate what aids, accommodations and/or modifications are necessary in general education classes and other education related settings to enable the student to be educated with nondisabled peers. These supplementary aids should be based on the individual needs of the student and can be applied to non-academic and extra-curricular activities.

In the final section of this page

<table>
<thead>
<tr>
<th>SUPPORTS FOR SCHOOL PERSONNEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

You will need to double click on the blue arrow down in order to get the following lines:

If you find you’ve allocated too many lines, simply double click on the [X] at the end, and choose yes when the question box appears:

In the portion, you will double click on the “memo” and type in the kind of training that is necessary for the school personnel so that the student may (1) Advance appropriately toward the annual goals, (2) Participate in the general curriculum, and (3) Be educated and participate with other students in educational activities. These supports should always be based on the student’s individual needs and should include when appropriate, information that clarifies when the supports will be provided, by whom, in what location, etc.

With the portion, double click on “when” and in the state the time frame.
In the Name box, double click on “name” to choose the name of the person responsible for facilitating the training.

Finally, double click on “location” to fill in where the training will occur:

The Memo at the bottom of the page can be used to explain the purpose of the training and when it would be appropriate for its use.

Assessment

The top portion of the Assessment page contains the student’s name, ID number (CIMS), Grade and Date of the meeting. These statistics auto fill.

The next section deals with Classroom-Based Assessments.

<table>
<thead>
<tr>
<th>CLASSROOM BASED ASSESSMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

Check the appropriate boxes to indicate if the student requires any accommodations or alternate assessments/methods to participate in classroom-based assessments. If a box is checked “Yes”, identify the accommodations in the ASSESSMENT ACCOMMODATIONS section at the bottom of the page.

Next is:

<table>
<thead>
<tr>
<th>DISTRICT WIDE ASSESSMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

Student will:

- Participate in the entire district-wide assessment with no accommodations
- Participate in the entire district-wide assessment with accommodations
- Participate in part(s) of the district-wide assessment (specify Assessments)
- Participate in the district-wide alternate assessment

Here, check the boxes to indicate whether or not the district administers a district-wide assessment and/or if the district administers a district-wide assessment at the student’s particular grade level. If they do not, check the second box and then double click on the Grade to indicate which grade level the
student is in from the following drop down menu:

Again, if accommodations are needed, they should be identified in the **ASSessment ACCOMMODATIONS** section and should be reflective of those already identified in the **SUPPLEMENTARY AIDS, ACCOMMODATIONS, AND MODIFICATIONS** section from the previous section.

If the student only participates in part of the district-wide assessments, check the third box, double click on **Assessments** to indicate which one(s) from the drop down menu.

If the student will not participate in the district-wide assessment(s), document the alternate assessment that will be used to assess the student.

<table>
<thead>
<tr>
<th>STATE ACADEMIC ASSESSMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>The State academic assessments are the Illinois Standard Achievement Test (ISAT) at grades 3-9, and the Spring State Achievement Exam (SSAE) at grade 11, and Illinois alternate Assessment (IAA) in grades 3-8 and 11.</td>
</tr>
<tr>
<td>Student will:</td>
</tr>
<tr>
<td>☐ State academic assessments are not administered at this grade level.</td>
</tr>
<tr>
<td>☐ Participate in the ISAT/SSAE with no accommodations.</td>
</tr>
<tr>
<td>☐ Participate in the ISAT/SSAE with accommodations.</td>
</tr>
<tr>
<td>☐ Participate in the IAA.</td>
</tr>
<tr>
<td>If the student will participate in the IAA, the following were met:</td>
</tr>
<tr>
<td>☐ The IAA is not appropriate (specify).</td>
</tr>
<tr>
<td>☐ The IAA participation guidelines were met.</td>
</tr>
<tr>
<td>☐ The alternate assessment selected is appropriate for the student (explain).</td>
</tr>
</tbody>
</table>

In this section, if appropriate, check the box to indicate that the State-assessment is not provided at the student’s particular grade level and indicate the grade level as in the District-wide assessment section.

Check the appropriate boxes to indicate the extent to which the student participates in the State Academic assessments. Again, accommodations needed for the State Academic assessment should be reflective of those needed during the student’s school day and provided for classroom-based assessments. When deciding on the appropriateness of accommodations, consider the following:

Accommodations should:

- Allow the test score to reflect the student’s proficiency in the area tested without the interference of his/her disability,
- Not compromise the purpose of the test. For example, the reading test cannot be read to the student because it destroys the purpose of the test. However, all or part of the science test can.
• Not compromise test security or confidentiality. All conditions that pertain to test security and return of the test materials after the test is administered still apply.

If the box indicating the student will not participate in the state assessment(s), document the alternate assessment that will be used instead in the Memo section.

Check the boxes to indicate whether or not the student is an English Language Learner, and if so whether or not they will participate in the ACCESS, with or without accommodations.

<table>
<thead>
<tr>
<th>STATE ASSESSMENT OF LANGUAGE PROFICIENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>The state assessment of language proficiency is Assessing Comprehension and Communication in English State to State (ACCESS) in grades K-12</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Student will:</td>
</tr>
<tr>
<td>☐ participate in the ACCESS with no accommodations</td>
</tr>
<tr>
<td>☐ participate in the ACCESS with accommodations</td>
</tr>
</tbody>
</table>

Again, if accommodations are selected, they should be identified in the Testing accommodations must be applied to classroom instruction as well as testing.

<table>
<thead>
<tr>
<th>ASSESSMENT ACCOMMODATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the student is participating in any of the above assessment(s) with accommodations, specify the needed accommodations (e.g., extended time, alternate setting, auditory testing) necessary to measure the student's academic achievement and functional performance. The accommodations should be appropriate for that particular assessment and reflective of those already identified for the student in the Supplementary AIDS, Accommodations, and Modifications section.</td>
</tr>
<tr>
<td>Accommodations</td>
</tr>
</tbody>
</table>

Double click on the Accommodations.

Educational Services and Placement

The Educational Services and Placement page is completed for Initial IEPs, annual reviews, or if the team changes the student’s special education services or placement. It must include ALL content areas, classes, and specify if the student will participate in general physical education or specially designed physical education.

The top section of the page will auto fill from the demographics portion of the IEP.

<table>
<thead>
<tr>
<th>EDUCATIONAL SERVICES AND PLACEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Described</td>
</tr>
<tr>
<td>Initiation Date: 05/03/08</td>
</tr>
</tbody>
</table>

In the next section, you indicate which general education classes and activities the student is able to participate in without supplementary aids. Use the Memo to either list the classes and activities or make a statement. (e.g., With the exception of English, the student is able to participate in all general education classes and activities without the use of supplementary aids.)
**PARTICIPATION IN GENERAL EDUCATION CLASSES**

The IEP must address all content areas, classes, and specify if the student will participate in general physical education.

<table>
<thead>
<tr>
<th>General Education with No Supplementary Aids</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Specify content areas, classes, whether or not the child will participate in general physical education, and extracurricular and other non-academic activities.)</td>
</tr>
</tbody>
</table>

You use the Memo box in the section marked General Education – with Supplementary Aids, to delineate those classes/activities requiring the aids, or make a general statement.

<table>
<thead>
<tr>
<th>General Education with Supplementary Aids (as specified in the Supplementary Aids section)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Specify content areas, classes, whether or not the child will participate in general physical education, and extracurricular and other non-academic activities with supports, if applicable.)</td>
</tr>
</tbody>
</table>

Finally, in the last portion of this section

<table>
<thead>
<tr>
<th>Special Education and Related Services within the General Education Classroom</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Specify content areas and classes in which the child will participate with the provision of special education and related services. List each special education and related service that will be provided during each class.)</td>
</tr>
</tbody>
</table>

You use the Memo box to indicate any general education classes and activities that the student is able to participate in with the provision of special education and related services. You must list each special education and related service that will be provided during each class or activity listed. This is where your INCLUSION minutes would be addressed. (For example, use this memo box to indicate Tweety receives resource help during the 20 minutes daily math lesson.)

To address the participation in Special Education Classes/Services, you need to first double click on the down arrow at the end of the section to add lines for the services. When you do, this

<table>
<thead>
<tr>
<th>PARTICIPATION IN SPECIAL EDUCATION CLASSES/SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>The IEP must address all special education and related services.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Min.</th>
<th>Frequency</th>
<th>Min/Week</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

will look like this:

<table>
<thead>
<tr>
<th>PARTICIPATION IN SPECIAL EDUCATION CLASSES/SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>The IEP must address all special education and related services.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>Min.</th>
<th>Frequency</th>
<th>Min/Week</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A new Service/Provider line will appear for every double click of the down arrow.

The same is true for

<table>
<thead>
<tr>
<th>Related/Other Service (B.)</th>
<th>Provider</th>
<th>Min.</th>
<th>Frequency</th>
<th>Min/Week</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The special education classes/services is to be used for the primary disability. For example, if the student is Resource, that will go on the top portion. Any other service they receive goes on the bottom under Related – Other Service.
IF a student is Speech/Language Impaired as the Primary Disability, then Speech/Language is listed on the TOP set of boxes under Participation in Special Education Classes/Services. The exception to this rule is for D/HH and VI students. Those are programs and ALWAYS go in the top section.

To enter the services, double click on **Service**. When the drop down menu appears, first take care of identifying the appropriate:

![Service Type Selection](image1)

by clicking on the `Type` and choose from the drop down.

Next, the time span is set at “Current IEP”:

![Time Span Selection](image2)

by clicking on the `Current IEP` to choose the calendar date from the calendar.

Then click on the correct circle to indicate:

![Service Delivery Options](image3)

and also

![Location Options](image4)

Remember that if you are working within a contained classroom environment, you must choose OUTSIDE Gen. Ed Classroom.
Next is the **Provider** link. Double click on **Provider** to get the following drop down:

<table>
<thead>
<tr>
<th>Provider Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>----------------</strong></td>
</tr>
<tr>
<td>Provider Name</td>
</tr>
<tr>
<td><strong>----------------</strong></td>
</tr>
</tbody>
</table>

Click on the **`enter`** in the Provider Title area to choose the correct Category Title of the provider. (The Provider Title area will auto fill from the services drop down for the related services area.)

Next, click on the **`enter`** for the Provider Name to choose the person actually providing the service. This is the link for the Medicaid encounter logs.

To allocate the time spent with each service, fill in the minutes by double clicking on **Min.** to get this drop down. Fill in the number of minutes:

**Link: Calculated Gen Ed Services Grid —...**

<table>
<thead>
<tr>
<th>New value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>----------------</strong></td>
</tr>
</tbody>
</table>

Now choose how those minutes will be provided by double clicking on **Frequency** and choosing the method of service delivery by clicking on the **`enter`**

![Select from Service Frequency](image)

Once this is done, the **Min/Week** will auto fill to produce the appropriate Educational Environment calculation in the following grid:

**Educational Environment (EE) Calculation (Ages 0-21) and (Ages 3-5)**

<table>
<thead>
<tr>
<th>Educational Environment (EE) Calculation (Ages 0-21) and (Ages 3-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Bell Minutes if Age 6-21 or Minutes spent in regular early childhood if age 3-5.</td>
</tr>
<tr>
<td>2. Total Minutes Outside of the General Education Setting if Age 6-21 or outside regular early childhood if age 3-5 (A+B)</td>
</tr>
<tr>
<td>3. Percent of Time Within General Education Classroom</td>
</tr>
</tbody>
</table>

**Start Date** | **End Date**
--- | ---
09/03/08 | **103**

The **Service** link will auto fill from **`enter`**.
Finally, check the appropriate boxes to indicate the discussion of ESY.

There is the addition of the link to provide a way to determine which specific goal needs to be addressed during the ESY session:

Educational Services and Placement – Page 2

Step 4: Educational Environment Considerations
The Team should consider the least restrictive environment requirements stated on this page. An explanation should be provided whenever a child will not participate in general education and activities. Double click on the blue memo bank and an explanation if you checked no to any of the three statements.
Step 5: Placement Considerations

The team must document at least three placement options. Additionally, the team must consider and document any potentially harmful effect of the proposed placement on the student or the quality of services he/she needs. Although an option may have a potential harmful effect, the team may still determine that it is the most appropriate placement for the student. Then, determine the placement option accepted. Double click on placement and the blue memo bank to select your options. Do not forget to double click on placement to accept your placement option.

### PLACEMENT CONSIDERATIONS

When determining the placement, consider any potentially harmful effect either on the student or the quality of services that he/she needs. After determining the student's placement, complete the "Placement" section on this cover sheet.

- **Yes**  
  For a child who is deaf, hard of hearing, blind or visually impaired, parents have been informed of existence of the Illinois School for the Deaf or the Illinois School for the Visually Impaired, and other local schools that provide similar services.

<table>
<thead>
<tr>
<th>PLACEMENT OPTIONS CONSIDERED</th>
<th>POTENTIALLY HARMFUL EFFECT OF THE PLACEMENT OPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placement</td>
<td>Memo® ©</td>
</tr>
<tr>
<td>Placement</td>
<td>Memo® ©</td>
</tr>
<tr>
<td>Placement</td>
<td>Memo® ©</td>
</tr>
</tbody>
</table>

Placement Option Accepted: Placement

---

Step 6: Transportation

Double click to check the boxes to indicate if the student requires special transportation. For any box checked "yes," specify how the transportation will be provided by double clicking on the blue memo and select from the drop downs.

### TRANSPORTATION

Check all that apply

- **Yes**  
  Special transportation is required to and from school and/or between schools.
- **Yes**  
  Special transportation is required in and around school buildings.
- **Yes**  
  Specialized equipment (such as special or adapted buses, lift, and ramp) is required.

Please explain and/or detail transportation: Memo® ©

---

Additional Notes

If any additional information needs further documentation, the team may note their comments within this section. Double click on the blue memo and write your statement in the box provided.
Report of Progress on Annual Goals

This screen provides quarterly progress of the student reaching the annual goal and objectives. Each goal implementer fills out this document. The case manager must distribute it at the end of the grading period after ensuring that all related service data has been entered.

Step 1: The goal and objective information that was added to the IEP should have filled in sections of the Progress Report for you. If it didn’t, a new goal/objective was created after the progress report. Click the reload button . Enter the progress information by double clicking on the blue progress memos.

[Reload the template to see current goals.]

The top portion, once again, auto fills:

REPORT OF PROGRESS ON ANNUAL GOALS

Name:  [Name]  ID:  2019  Grade:  10  Date of Meeting:  09-02-08

Specify the extent to which the student’s progress is sufficient to enable the student to achieve the goals by the end of the IEP year.

Double click on the appropriate Date icon to indicate when progress is reported.

<table>
<thead>
<tr>
<th>Period</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Date</td>
<td>Date</td>
<td>Date</td>
<td>Date</td>
<td>Date</td>
<td>Date</td>
<td>Date</td>
<td>Date</td>
</tr>
</tbody>
</table>

Each measurable annual goal will be listed:

<table>
<thead>
<tr>
<th>Goal #</th>
<th>Measurable Annual Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>[Goal Description]</td>
</tr>
</tbody>
</table>

After each measurable goal area is Staff Name: [Name]. Double click on the name icon to get:

Staff Name: [Name].

Fill in the appropriate names of the staff members associated with the goal.

Followed by:

<table>
<thead>
<tr>
<th>Objective / Benchmark</th>
<th>Period</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td>Progress</td>
<td></td>
</tr>
</tbody>
</table>

Double click on [Progress] to get the following drop down

[Select from General codes - Progress Report Codes]

Then choose the appropriate code.
Use the following guidelines for choosing the correct option:

**Not addressed:** You have not yet worked on this goal

**Emerging:** You have just begun to work on the concept and student is accurate up to 60% of the time.

**Continuing:** Student is familiar with the concept and is accurate 61-80% of the time.

**Met:** Student is able to accurately perform goal with 80% or more accuracy.

REMEMBER: A student does not have to reach 100% to meet a goal. Think of percentages as grades, 80% is passing with a “B”, 90% is passing with an “A”. It’s okay to meet a goal with 70% accuracy.

Use the **Memo** in the **Additional Comments** section to write any narrative you feel is necessary to support the code used to report on progress. Make sure you date the entries.
Service Plan

Service plans are used instead of the Individual Education Plan (IEP) when a student is not attending classes in the public school system.

The first page consists of the student’s demographic information:

PRIVATE / PAROCHIAL SCHOOLS SERVICES PLAN

- **School Name**: [School]
- **Initiation and Duration of Services**
- **Start Date**: Date
- **End Date**: Date
- **Student Name**: T. Bird
- **Grade**: 10
- **Age**: 15y.8m
- **Date of Birth**: 12/22/92
- **School Year**: Year

In this first section, the student’s name, date of birth, grade and age will auto fill. You will have to double click on the **Date** icon to get the calendar, and then the as in the IEP section to fill in start and end dates. To fill in the school year, double click on **Year** to get the calendar, and type in the appropriate school year in the blank space.

To fill in the “school”, double click on **School** and get
leave the top section blank and type in the school’s name where it says “Description” on the bottom.

Next is the parent/guardian information:

<table>
<thead>
<tr>
<th><strong>PARENT/GUARDIAN INFORMATION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Parent/Guardian Name:</strong></td>
</tr>
<tr>
<td>Big Bird</td>
</tr>
<tr>
<td>Relationship: Parent</td>
</tr>
<tr>
<td>Language: Language</td>
</tr>
</tbody>
</table>

Here, the parent/guardian name and address will auto fill, you will have to double click on to choose from the upper portion of the drop-down menu. Double click on the “language” and “phone” links to fill those in as well.

The special education information:

**SPECIAL EDUCATION SERVICES**

<table>
<thead>
<tr>
<th>Service</th>
<th>Provider</th>
<th>Setting</th>
<th>Min/Wk</th>
<th>Frequency</th>
<th>Direct</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
</table>

**RELATED SERVICES**

<table>
<thead>
<tr>
<th>Service</th>
<th>Provider</th>
<th>Setting</th>
<th>Min/Wk</th>
<th>Frequency</th>
<th>Direct</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
</table>

This section is filled out in the exact same way as the educational services section of the IEP.

Finally, the bottom portion of the first page of the Service Plan (ISP) looks like this:

**Least Restrictive Environment Recommendation:**

- a) Classroom instructional accommodations:
  - Accommodations

- b) Test accommodations:
  - Accommodations

**Reporting of Progress**

- a) Method for measuring progress:
  - Menu
- b) How progress will be reported to the parent/guardian:
  - Menu

**Exit Criteria**

<table>
<thead>
<tr>
<th>Exit Date</th>
<th>Reason</th>
<th>Reason</th>
</tr>
</thead>
</table>

**Comments/Additional Information:**

- Menu

**Name**

United Signature of District Name and Representative's Name

Field Signature of Private School Representative

Field
The links under “Least Restrictive Environment” works like they do in the IEP.

To fill out the section for Reporting of Progress, you will click on the **Memo** link under a) Method of measuring to get:

![Select General codes - How Measured](image)

then choose the appropriate choice from before clicking to drop it to the bottom before clicking **OK**. If a different type of measurement will be used, type it into the bottom portion without using the drop down menu and then click **OK**. Click on the **Memo** link under b) How progress will be reported to get:

![Howreported](image)
preferred method. Double click to move it to the left (selected memo bank preview) then double click again to move it to the top before clicking on OK.

Use the “Exit Criteria” portion when you are dismissing the student. Fill in the “date” as shown previously to provide the exit date. Then double click on reason to get the following drop down:

options for exiting a student and double click on the appropriate reason. Finally, double click on the Memo to get the big memo box to fill in any needed information under the “Comments/Additional Information” as you would on an IEP.

The goals and objectives are found on the second page, which will be yellow and in “read only” as on the IEP before the goals are selected.

<table>
<thead>
<tr>
<th>Name</th>
<th>TwentyBird</th>
<th>ID: 2019</th>
<th>Grade</th>
<th>Grade</th>
<th>Service Plan Date</th>
<th>Date</th>
</tr>
</thead>
</table>

EDUCATIONAL NEED

Educational Need: Memo

STATE GOAL

Title(s) of goal implementer(s): Memo

Present Level of Performance: Memo

Goal: Goal

Criteria: Criteria

Procedure: Procedure

INSTRUCTIONAL OBJECTIVE/BENCHMARKS

Objective: Memo

Criteria: Criteria

Procedure: Procedure
As on the IEP, you need to click on the goal memo bank to get to the goals memo bank. Then you can click on the and proceed as you would for the IEP goals. Once you choose the goals/objectives, make sure you click on the to save before clicking on the to go back to the ISP page. Once there, you can click on the to fill in the appropriate role of the goal implementer with:

Double click on the for Present Level of Performance to get the big memo box where you can type in the present level information.

Then you double click on and get the following drop down:
Finally, double click on Procedure and choose which procedure(s) will be followed as on the IEP.
Memo Banks

What is a Memo Bank?

A Memo Bank is a utility that stores word processing text. It is used to store sentences and/or phrases that a user types repeatedly in Excent Tera. This way you do not have to repeatedly type text in to a document, you can just click on it and Excent Tera will type it for you.

There are two types of memo banks: one is a district wide memo bank, the other is a user memo bank. The district memo bank is automatically available to all users and setup with district wide common text. Every user has their own memo bank that is automatically available to them. (Note: user memo banks can be shared.)

How do I use a Memo Bank?

1. Open any document in Excent Tera and double-click any Memo:

2. To pick a memo, you need to double-click on a “+” sign to expand the topic.
3. Click on the memo you wish to insert and it will appear in the yellow section.
4. Double-click the yellow section to insert the memo in the text section above. Note: The text will be inserted where the cursor is flashing.
5. Click “OK” when you are done entering text.
6. That is how to use a memo from your memo bank.

How do I create my own Memo?

1. Open any document in Excent Tera and double-click on the Memo where you want to add your memo. You will see the dialog box above.
2. Click the “Memo Banks” button ( ) to add/edit your memo banks:
I am going to take you through the steps to create a brand new memo Area, Category, and Text. Area, Category, and Text are the three minimum things you need to create a memo. You can also create optional sub-categories.

3. Before you begin adding memos, think about and develop the hierarchy:
   - Area
     - Category
     - Text
     - Sub-Category
     - Text

Create a New Area

1. Click on the new button (.segments) and select “New Area” from the menu.

2. Your cursor is blinking in the “Area Description” field in the dialog box above. Enter your Area. For training purposes, I am going to enter “This is an Area.”

3. Click save (.segments). You should now see your Area in the “Select an Area” section:

4. Once you have an Area, now you can create a Category.

Create a New Category

1. Click on the new button (.segments) and select “New Category” from the menu.

2. Your cursor is blinking in the “Description/Title” field in the dialog box above. Enter your Category. For training purposes, I am going to enter “This is a Category.”
3. Here is where you need to think about your hierarchy: You can either add Text or Sub-Category. Note: Most of the time you will add text.

A. Add New Text

1. Click in the Text box and enter your text. For training purposes, I am going to enter “This is some text.” (See section Text Codes for using students’ names, his/her, etc.

2. Click save ( ). You should now see your Category in the “Category” section and your Text in the text section:

B. Add a New Sub-Category (optional)

1. In order to add a Sub-Category, you must already have an Area and Category. If you do not have them, please review the steps above to create a new area and new category.

2. Select the Category that you wish to add a Sub-Category by clicking on it once in the “Category” section.

3. Click on the new button ( ) and select “New Sub-Category.”

4. Your cursor is blinking in the “Description/Title” field. Enter your Sub-Category Title (just as you did for the Category). For training purposes, I am going to enter “This is a Sub-Category.”

5. Enter your Text in the “Text” field (just as you did for the Category Text). For training purposes, I am going to enter “This is a sub-category text.”

6. Click save ( ). You should now see your Sub-Category and your Text in the “Sub-Category” section. Note: Make sure you select the correct Category and Sub-Category to see the Text:
Finishing Touches

When you are done creating Areas, Categories, Text, and Sub-Categories:

1. Click Exit (X).
2. Now, you are back to the memo text box. The Memo Bank Hierarchy has the Areas, Categories, Text, and Sub-Categories that we created.

Text Codes

- Text codes are Excent Tera codes that you can use in memo banks to automatically have Excent Tera enter student’s names, for example.
- Codes:

<table>
<thead>
<tr>
<th>Code</th>
<th>Result</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sname</td>
<td>student’s first name</td>
<td>automatically enters the current student’s first name.</td>
</tr>
<tr>
<td>H/H</td>
<td>His or Her</td>
<td>automatically enters His or Her depending on the student’s gender.</td>
</tr>
<tr>
<td>h/h</td>
<td>his or her</td>
<td>automatically enters his or her depending on the student’s gender.</td>
</tr>
<tr>
<td>H/S</td>
<td>He or She</td>
<td>automatically enters He or She depending on the student’s gender.</td>
</tr>
<tr>
<td>h/s</td>
<td>he or she</td>
<td>automatically enters he or she depending on the student’s gender.</td>
</tr>
<tr>
<td>hm/h</td>
<td>him or her</td>
<td>automatically enters him or her depending on the student’s gender.</td>
</tr>
</tbody>
</table>
Frequently Asked Questions

Do I have to enter student demographics?

- No. Student demographic information gets transferred from CIMS to Excent Tera.
- Note: You may change a student's address, for example, but CIMS may change it back. This is because CIMS has the "official" address. The school secretary is the only one who can change an address in CIMS.

Why can’t I create a new student?

- Only Coordinators can create a new student.
- Student information gets transferred from CIMS to Excent Tera, so there isn't a need for staff to add new students.

One of my students is NOT in the Student Explorer. Where did he/she go?

- Note: You will ONLY see your caseload in your student list.

- Check your filters on the bottom right of the student listing. You may have filtered out your students.

For example: If I have students at Greenwood and I filtered my student list to only see students at Washington, then it would appear as if those Greenwood students are missing.

- Change your student filter.
- If you changed the filter and a student is still not in your list, then contact your coordinator so he/she can update your caseload.
- This can also mean that a student is NOT flagged in CIMS to be a Special Education Student. If this is the case, then contact your coordinator.
Why do I have to press the print button twice?

When you click the print button, a print preview window pops up. This is your chance to review the document before you print. If the document looks good, then you will need to click the print button in the print preview window to actually print out the document.

How Can I Right-Click on a Macintosh Mouse That Has Only One Button?

On the keyboard, press and hold the “Control” button on the keyboard and then click the mouse. This is called a control-click.

Each student is listed in a different color. What do the colors mean?

In the Student Explorer, click Colors located under the Exit button.

Why isn’t the student’s contact name auto-filling in to documents correctly?

Excent Tera auto-fills the primary contact’s salutation. Make sure that the contact is the only primary contact and the salutation is correct.
DUE PROCESS
Due Process

The district will comply with, and assure that, the responsibilities listed in the state and federal regulations are adhered to by district policy with processes and procedures set forth.

The district provides procedural safeguards in the native language to:

1. Parents, guardians (unless the guardian is a state agency), or persons in parental relationship to the student;
2. Surrogate parents; and
3. Students whose rights have legally transferred due to age or emancipation.

In the event that the district becomes involved in a due process hearing, the district shall:

- If a staff member gets a request for a due process, they must give the parent the ISBE form (19-86) (Appendix T: ISBE Form 19-68) to complete. It is imperative that the parent provides contact information and the name of the school the child is attending as well as a basic statement of the nature of the case.
- Staff member must contact the Director of Special Education Compliance via phone and email to alert the Director that a parent is requesting a due process.
- Staff member should fax the due process request to the Director of Special Education Compliance.
- The Director of Special Education Compliance will forward due process request to the State Education Agency within five days of parental request.
- If the district wants to submit a request to dismiss the due process hearing, it will have to be completed and sent within 15 days to ISBE’s due process coordinator.
- Following the receipt of the due process request, the non requesting party will have 10 days to complete a written response of (a) an explanation of why the district proposed or refused to take the action raised in the complaint; (b) a description of other options that the IEP team considered and reasons why they were rejected; (c) a description of each evaluation procedure, assessment, record, or report the agency used as the basis for the proposed or refused action.
- If the district believes it provided sufficient “prior written notice” response to the due process request, the district should provide documentation within ten days of receiving the request for due process.
- Districts must hold resolution sessions within 15 days of the date the non requesting party received the due process (unless it is waived)
- The district attorney cannot attend the resolution session unless the parent has a legal representative.
- The district must engage in full and frank discussions of the issues that led to the due process.
• The district has until the 30th day to resolve the issue.

• Any agreement must be committed to in writing and signed by both parties. Either party could void the agreement in three business days.

• If parties choose to use mediation or waive the resolution session completely, they must agree in writing (Appendix U: Waiver of Resolution Session).
Chart 6a: Timelines

Resolution

Day 1: Request Received by District

Day 5: District forwards request to ISBE

Day 10: District transmits prior written notice and/or written response

Day 15: District files notice to seek dismissal (optional)

Day 30: Cut off date for resolution session

Day 31-65: Pre hearing and Hearing

Day 75: Latest date for decision by hearing officer

Mediation

Day 1: Request Received by District

Day 5: District forwards request to ISBE

Day 10: District transmits prior written notice and/or written response

Day 15: Deadline to submit request for mediation or to waive resolution

Day X: Close of Mediation

Day X + 1: First day of hearing

Day X + 45: Latest date for decision by hearing officer
BEHAVIOR- DISCIPLINE
Overview

AUTHORITY OF SCHOOL PERSONNEL.

To the extent removal would be applied to children without disabilities, school personnel are authorized to remove a child with a disability from the child’s current placement for not more than ten consecutive school days for any violation of school rules, consistent with state requirements relating to the suspension of pupils. School personnel are authorized to order additional removals of not more than ten consecutive school days, consistent with state requirements, in that same school year for separate incidents of misconduct (as long as those removals do not constitute a change of placement).

For purposes of removals of a child with a disability from the child’s current educational placement, a change of placement occurs if:

- The removal is for more than ten consecutive school days or
- The child is subjected to a series of removals that constitute a pattern because they cumulate to more than ten school days in a school year, and because of factors such as the length of each removal, the total amount of time the child is removed and the proximity of the removals to one another.

After a child with a disability has been removed from the current placement for more than ten school days in the same school year, during any subsequent days of removal the district provides services necessary to enable the child to appropriately progress in the general curriculum and appropriately advance toward achieving individualized education program goals. As long as that removal does not constitute a change of placement, the school personnel, in consultation with the child’s special education teacher, determine the extent of the services.
Functional Behavioral Assessment

Completing a functional behavioral assessment will assist the IEP team in understanding and modifying problem behavior by looking at the relationship between behavior and the environment. During this process, environmental events and circumstances are analyzed and the team develops hypotheses as to the functional intent of target behaviors. The FBA (functional behavioral assessment) is not a single observation, test or interview but rather a multi-method process designed to identify setting events, antecedents and consequences associated with the occurrence and nonoccurrence of behaviors so that appropriate behavior interventions can be developed (Appendix V: Functional Behavioral Assessment).

An FBA should be conducted in the following circumstances:

1. When a student’s problem behavior interferes with his/her learning or the learning of others.
2. When a student’s behavior presents a danger to him/herself or others.
3. Before a behavior intervention plan is developed as the behavior intervention plan is based on the functional behavior assessment.

When completing the FBA, the team should use both direct and indirect methods of data collection. Direct methods include behavioral observations in all settings where the behavior occurs. Indirect methods include gathering information from a variety of sources (teachers, administrators, parent/guardian, student), review of records (discipline and historical), and the utilization of rating scales and checklists. Data collected should gather general information about student strengths, student weaknesses, student skills, health and medical issues, peer and family relationships, involvement in activities and personal interests. Specific information gathered will assist in identifying when the behavior is most likely and least likely to occur, what happens immediately before the behavior and immediately after the behavior and what appears to be the goal of the behavior for the student. The process will also identify functional alternatives that the student could develop to replace the target behavior.
Behavior Intervention Plan

Illinois State Board of Education Policies and Procedures require that an IEP team consider special factors in developing an IEP for a student with a disability. For students whose behavior impedes their learning or the learning of others, the IEP team must consider the implementation of positive behavior strategies and interventions. This may include a formal behavior intervention plan.

The BIP (behavior intervention plan) is based on the functional assessment of behavior and includes positive behavior strategies, program or curricular modifications and the use of supplementary aids and supports to modify target behaviors. The emphasis of the behavior intervention plan should be the teaching of replacement behaviors and remediation of performance and skill deficits. The behavior intervention plan clearly identifies target behaviors, positive behavioral interventions, needed supplementary aids and supports and potential restrictive interventions. The plan also identifies provisions for coordinating the behavior intervention plan with parent/guardian.

The development of the behavior intervention plan should be viewed as one step in the behavior intervention process. As a part of the plan, the IEP team will identify methods for collecting data and monitoring progress. If anticipated progress is not being made, the IEP team will reconvene to discuss lack of progress and make necessary adjustments to the behavior intervention plan or the IEP.
Manifestation Determination

A manifestation determination review is conducted by the individualized education program (IEP) team and other qualified personnel in a meeting. In carrying out the review, the individualized education program team and other qualified personnel determine that the behavior of the child was not a manifestation of the child’s disability only after first considering, in terms of the behavior subject to disciplinary action, all relevant information, including:

- Evaluation and diagnostic results including the results or other relevant information supplied by the parents of the child (Appendix X: Determining if Pattern of Suspensions Exits);
- Observations of the child; and
- The child’s individualized education program and placement.

If the individualized education program team and other qualified personnel determine that any of the standards below were met, the behavior is considered a manifestation of the child’s disability. These standards are as follows:

- The conduct in question was the direct result of the District’s failure to implement the IEP.
- The conduct in question was caused by, or had a direct and substantial relationship to, the child’s disability.

If, in the manifestation determination review, the District identifies deficiencies in the child’s individualized education program or placement or in their implementation, it takes immediate steps to remedy those deficiencies.

The District applies the relevant disciplinary procedures for children without disabilities to the child only if, as a result of the manifestation determination review, the District determines the behavior of the child with a disability was not a manifestation of the child’s disability. The District applies the relevant disciplinary procedures in the same manner in which they would be applied to children without disabilities.

When the District conducts a manifestation determination and determines that the behavior at issue is not a manifestation of the child’s disability, the District provides services necessary to enable a child to appropriately progress in the general curriculum and appropriately advance toward achieving the individualized education program goals during a period of removal. In such a case, the child’s individualized education program team determines the extent of the services.
Interim Alternative Educational Settings

School personnel are authorized to order a change in placement of a child with a disability to an appropriate interim alternative educational setting for the same amount of time that a child without a disability would be subject to discipline but for not more than 45 school days if:

1. The child carries or possesses a weapon to or at school or to a school function under the jurisdiction of the state or a local educational agency;

   Weapon means:
   A device, instrument, material, or substance, animate or inanimate, that is used for, or is readily capable of, causing death or serious bodily injury. The item does not include a pocketknife with a blade of less than 2 1/2 inches in length.

2. The child knowingly possesses or uses illegal drugs or sells or solicits the sale of a controlled substance while at school or a school function under the jurisdiction of the state or a local educational agency; or

   Illegal drug means:
   A controlled substance, but does not include legally possessed by a health care provider.

3. The child inflicts “serious bodily injury” to another student, staff member, or parent while at school or schools function under the jurisdiction of the state or a local educational agency.

   “Serious Bodily Injury” means bodily injury that refers to:
   a. Substantial risk of death
   b. Extreme physical pain
   c. Protracted and obvious disfigurement; or protracted loss or impairment of the function of a bodily member, organ, or mental faculty.

The individualized education program team determines the interim alternative educational setting. Any interim alternative educational setting in which a child is placed:

- Is selected so as to enable the child to continue to progress in the general curriculum, although in another setting, and to continue to receive those services and modifications including those described in the child’s current individualized education program, that will enable the child to meet the goals set out in that individualized education program; and

Includes services and modifications that are designed to prevent the behavior that resulted in the child’s placement in an interim alternative educational setting behavior from recurring,
Chart 7a: Manifestation Determination

Special Circumstances:
1. Carries Weapon
2. Possesses Illegal Drugs
3. Causes Serious Bodily Harm

May remove student to an Interim Alternative Education Setting (45 day placement)

IEP team must determine how student will continue to progress towards IEP goals and objectives

Within 10 days the IEP team will conduct a FAB and BIP

On date of removal, building principal must notify the parent

Due process may be requested if parents disagree, student will remain in IAES

No Special Circumstances Manifestation Conducted
1. Suspension 0 for more than 10 days.
2. Suspensions create a pattern and constitutes change in placement

Notify Parents.

Schedule IEP meeting.

Conduct IEP meeting within 10 days.

Behavior not Manifested:
1. May discipline in same manner as students
2. Students must receive educational services

IEP teams must meet within 2 weeks of the last behavioral incident and conduct FAB and a BIP.

If no pattern exists the students must be allowed to continue to progress towards his IEP goals and access the general education.

1. Consider length of suspension.
2. Total cumulative days.
3. Proximity of time between suspensions.

Due process may be requested if parents disagree, student will remain in the IAES.

No Special Circumstance Manifestation Determination Review Conducted
1. Not more than 10 days
2. No Pattern of Suspension that constitutes change in placement.
RECORDS MANAGEMENT
Confidential Records

A confidential record is the Special Education record for a student. Confidential records are contained in the School Based Cumulative File and also in the Central File located at Lincoln Center.

- The Central File contains the student’s complete record and is housed at the Lincoln Center.

- The School Based Cumulative File contains a portion of the District Central File. This folder must be kept in a locked file cabinet in the main office of the school. Access to this file is limited to authorized staff (i.e., case manager, principal, and related services staff). If the folder should need to be removed from the main office for review or updating, the person removing it should sign the folder out using the “Folder Sign-Out Sheet” (Appendix AA: Confidential Folder Sign-Out Log). Items contained in the Central File or the School Based File may not be removed, altered, or destroyed.

- As new confidential records are developed such as IEP’s, evaluation reports, testing protocols, etc., the case manager should submit all original documents to the Central File at the Lincoln Center and copies of the documents to the School Based File. This process assures that the official district file and School Based File are complete.

- A permanent record or cumulative record is:
  - Basic identifying information
  - Academic transcripts
  - Attendance record
  - Accident and health reports
  - Information pertaining to release of this record
  - Honors and awards
  - School-sponsored activities and athletics

  No other information shall be placed in the permanent record. The permanent record shall be maintained for at least 60 years after the student has graduated, withdrawn, or transferred from the home district.

- The temporary record (central file) may include:
  - Family background
  - Intelligence and aptitude scores
  - Psychological reports
  - Achievement test results
  - Participation in extracurricular activities
  - Honors and awards
  - Teacher anecdotal records
  - Disciplinary information
  - Special education files
  - Verified reports or information from non-educational person
  - Verified information of clear relevance to the student’s education
  - Information pertaining to release of this record
The temporary record shall be maintained for at least 5 years after the student has graduated, withdrawn, or transferred from the home district or reviewed every four years.

- **Electronic Files**
  - Confidentiality rules apply to electronic files
  - Invitations and other documentation can be sent electronically; therefore a confidentiality statement to emails should be added. For example:

    The contents of this e-mail message and any attachments are intended solely for the addressee(s) named in this message. This communication is intended to be and to remain confidential and may be subject to applicable attorney/client and/or work product privileges. If you are not the intended recipient of this message, or if this message has been addressed to you in error, please immediately alert the sender by reply e-mail and then delete this message and its attachments. Do not deliver, distribute or copy this message and/or any attachments and if you are not the intended recipient, do not disclose the contents or take any action in reliance upon the information contained in this communication or any attachments.

  - Electronic communication can become part of student’s temporary record

**Folder Organization**

The District Central File and School Based cumulative folder is organized into four sections:

- **Section 1:** Includes all parent communications, medical information not related to evaluations, contact logs, status record and access log.

- **Section 2:** Includes copies of all Individual Education Plans ordered from oldest on the bottom to most recent on the top. On the top of each IEP should be placed the *Parent/Guardian Notification of Conference* forms for that IEP and the *Parent/Guardian of Conference Recommendations* form for that IEP.

- **Section 3:** Includes *Procedural Safeguards Receipt* forms. *Parent/Guardian Consent for Special Education Placement* form, *Report of Progress on Annual Goals* form, and other legal papers or paperwork.

- **Section 4:** Includes all information related to evaluation such as screening information, referral information, *Parent/Guardian Consent for Evaluation* forms, medical information related to evaluation or eligibility and all evaluation reports.

**Documenting Information and Folder Access**

Compliance with legal mandates requires careful documentation. The District Central File Folder and the School Based Cumulative Folder both contain forms to document activities related to a student’s special education program and to document access to the confidential folder.
**Status Record (Appendix Z)**

Status Records are found in Section I of the District Central File Folder and School Based Folder. Status Records are used to document activities related to a student’s special education program such as dates and content of parent contacts, conferences not involving IEP meetings, logs of related services contacts not reflected elsewhere, and any other issues that require documentation for compliance monitoring.

**Access Log (Appendix AA)**

The Access Log is found in Section I of the District Central File Folder and School Based Cumulative Folder. The district is legally required to maintain an access log in each confidential folder. The access log keeps a record of parties obtaining access to educational records (except access by parents and authorized employees of the school district), including the name of the party, the date access took place, and the purpose of the authorized use.

Procedures for District Central File Folder and School Based Cumulative Folder access by a person who is not a school district staff person are given below.

1. The person will request access verbally or in writing to the Office of Special Services.
2. If the party requesting access is not a parent or legal guardian of the child, it will be necessary for the requesting party to obtain written authorization from the Parent/Guardian allowing the records to be accessed.
3. The requesting party will arrange a time for the review of the District Central File Folder.
4. Special services staff or an administrative designee will obtain the folder from the file and remain with the requesting party while the records are reviewed. Under no circumstances shall anything be removed from the confidential folder while being reviewed.
5. The administrative designee will record the required information on the Access Log, insert a copy of the Confidential Release of Information form (if applicable) or other documentation of written authorization in section I of the folder and return the folder to the file.

There is no required time frame regarding this process. If the administrative designee is able to arrange to be present during the review of records, this may occur as soon as the request is issued. If the administrative designee is unable to be present, a time should be arranged as soon as possible for the records to be reviewed.
Managing Student Records

Each case manager is responsible for managing the student records on their caseload. This includes familiarizing himself/herself with the IEP requirements for each student at the beginning of the school year, updating school folders throughout the year, and making sure all original documents are sent to the Central File Clerk at the Lincoln Center.

Communicating Progress

Throughout the school year, many documents will be generated by the case manager which will become part of the District Central File or the School Based Cumulative File. One such form is reporting progress on annual goals. This form provides a parent/guardian with a report of their child’s progress toward annual goals and the extent to which that progress is sufficient to enable the student to achieve the identified goal by the time of the next annual review.

Parents/Guardians of students with disabilities are to be informed of their child’s academic progress at least as often as Parents/Guardians of student without disabilities. That means that a minimum of four progress reports each year must be completed on each special education student. At the end of each quarter, the Case Manager will complete and mail a copy of the Report of Progress on Annual Goals form to the Parent/Guardian of each child on their caseload, or present it to the Parent/Guardian at parent conference. A copy of the report should be placed in Section 3 of the School Based Confidential folder.

Case Managers are encouraged to participate in parent-teacher conferences along with the general education teacher to discuss student progress. Quarterly IEP meetings are not required and will not automatically be scheduled by the Case Manager. An IEP meeting, however, may be scheduled at any time by Parent/Guardian request to further discuss a student’s special education program.

During the last week of school the Case manager must review and update all of the School Based Temporary File for the students on his or her caseload. This process should go very quickly because original documents should have been sent to the Central File Clerk at the Lincoln Center upon their creation. Do not hold all documents until the end of the year.

Each student file should contain the following:

a. Documentation of parent contacts
b. Annual Review IEP
c. Receipt of Procedural Safeguards form
d. Parent/Guardian Notification of Conference form(s)
e. Parent/Guardian Notification of Conference Recommendations forms
f. Parent/Guardian Consent for Evaluation form (if applicable)
g. Evaluation reports (if applicable)
h. Parent/Guardian Consent for Special Education Placement form (if applicable)
Related Service Staff treatment notes:

- Medicaid logs should be completed on a minimum of a weekly basis for each service provided on the computer system.
- Medicaid logs, found within the online IEP system should be completed and up-to-date by the fifth day of each month. Additional treatment notes not in Medicaid logs and not recorded in IEP documents may be stored in locked filing cabinets in related service staff files maintained for 5 years after the student graduates or they are reviewed every four years.

Guidelines for Records Management

**Guidelines for Student Transfers into the District**

*Note: Prior to September 15 students enroll at local school.*

1. School office will notify Move-In Facilitator that a new student has enrolled and is part of the special education program.

2. Move-In Facilitator calls previous school district and requests the contact person to send student records via fax if possible. Records requested are:
   a. Most recent evaluation
   b. Most current IEP
   c. Signed placement consent
   d. Signed evaluation consent
   e. All special education files are asked to be sent through U.S. mail to Move-In Facilitator
   f. Move-In Facilitator tags (creates a special file number) student into CIMS.

3. Once faxed records are received, Move-In Facilitator makes copies for:
   a. Special education teacher for them to review the IEP as written.
   b. Other special education or pupil services staff assigned to the student for them to review the IEP as written.

4. Move-In Facilitator contacts parent, asks for any special concerns they may have regarding their child.

5. Move-In Facilitator contacts special education staff assigned to the student to hear any concerns about the IEP.

6. Move-In Facilitator compiles all the records and forwards them to the Special Education Coordinator and building principal for review.

7. The coordinator review’s student records and does one of these three things:
   a. Reviews and accepts the IEP (IEP is implemented)
   b. Reviews and asks for minor changes to be implemented to IEP at next review (IEP is implemented)
   c. Reviews and does “not” accept IEP - when this happens, an IEP meeting will need to be scheduled as soon as possible.
8. The coordinator contacts parents to request a meeting with them at their earliest convenience.

9. The coordinator turns student’s paperwork over to the Special Education File Clerk for copying.

10. Central File Clerk copies the file and sends it to the School Based File.

Guidelines for Students Exiting our District

1. Special education teacher notifies the Special Education Coordinator that a student is leaving. The Special Education Coordinator completes a Program Change Form (Appendix DD: Program Change Form).

2. The CIMS Data Enrollment/Transportation Specialist contacts student transportation providing a date that busing should stop.

3. The Central File Clerk should receive a faxed request for paperwork from new district.

4. Records Clerk will fax a copy of:
   a. Most recent IEP
   b. Current evaluation
   c. Consent forms as requested

5. Records Clerk will then forward student’s special education files by U.S. Mail to new school district.

6. If student is a Medicaid participant, all original paperwork will be kept on site for future Medicaid auditing. A copy of file will be made and sent to the new school.

7. If student is not a Medicaid participant, the original file will be sent.

Transferring Student Files over the summer when the Student Moves Within the District

1. A list is compiled of students transferring to another level (building) at the end of the school year. Projected school is listed.

2. Records are held in the current school until the receiving school requests them.

3. Shortly before the beginning of the new school year projected schools are contacted to determine if the student has enrolled for the fall semester. If it is confirmed that the student has enrolled, the records are sent to the new school. If any students have not enrolled, the list will be shared with other school administrators within the district. If the student has not enrolled, the records are sent to the District file clerk at Lincoln Center.
Accessing Central File Records

The following procedures will be followed to ensure the maintenance and security of confidential student records.

All documents and information within the Central Files Office are confidential and should be locked at all times. All files maintained outside the Central Files Office are to be locked at all times, no exceptions, regardless of location in building.

Requests for Information or Documents

No information may be given via the telephone. This includes central file numbers, whether a student is in special education or not, registered within the District or any other type of information. Exceptions may be made only if the requester is known to be a District employee in a capacity that warrants the giving of said information. Requests for information should be completed in the following manner:

A. All requests for information should be accompanied by an Authorization for Release of Information, signed by a parent or legal guardian. The request should be on that school’s letterhead and should contain the contact person’s name, phone and fax number as well as address. If no Authorization is attached, call contact person and try to acquire such authorization (requests from School Districts may be honored without said Authorization, but, Waukegan School District does ask for said Authorization);

B. Requests from governmental agencies/community organizations must have parental authorization or no such requests should be honored. If request comes from a questionable organization, verify said request through parent or other process; and

C. When parent/student walks in and requests information, they must have picture identification.

All documents mailed/faxed/or given to anyone are to be logged in each files’ Contact Sheet as well as the Central Files Documents Mailed Log.

If records are sent to another school district, the files are then “Dropped” (to drop files, see Section 4 of this Manual) from the Active Files and notification given to appropriate Coordinator/Secretary.

Records Received

When documents/records are received via U.S. Mail/E-Mail, the document is date-stamped, logged onto the Central Files Records Received Log with notification given to the School Psychologist of its receipt and nature and left in their mailbox at Lincoln Center.
Student Registration

When new students register at the Welcome Center and have an IEP, Student Support will forward documents immediately to Central Files. A search is made to see if student has a prior Central File. If so, the file is Reactivated (to reactivate files, see Section 4) and said information is then passed on to the appropriate School Psychologist, via e-mail, advising them of the student’s name, central file number, type of program and where information may be located.

If the student has no prior file, a Request for Central File Number form is completed and transmitted the same as if an old file existed (to make a New Central File, see Section 4).

Making New, Replacement and Dropped Central Files

New Files: Take Requests for Assignment of a Central File Numbers and check request against the Central Files Master List.

If a number already exists, do the following: (a) pull the original folder and the one that is about to be made and put the Request, as well as any other documents into the original folder; (b) put the new folder back into the bin to be re-used; and (c) use the “Please Take Note Form” to notify the requestor of the student’s accurate Central File Number and other information.

If number is not duplicated, attach the appropriate numbers to the tab of the new folder and put a Binder Clip on the right side of the file. Take the Request and use the information provided to type (a) Folder Card; (b) Index Card; and (c) Contact Sheet. File the Index Cards (alphabetically) in the Index File. Binder Clip the Contact Sheet on top of the Request for Central File Number on right side of folder, place any filing on top of the contact sheet, than put a Log-In Sheet on top of that. Then tape the Folder Card to the front of the folder.

Enter the information into File Maker Pro and the Central Files Master List and place the folders (numerically) in the Active Files.

Dropping and Reactivating Students: Take Drop/Activate forms from filing bins. Pull Files and move from Active to Drops or vice-versa; pull Index Card from Index File and move accordingly and enter the drop or re-activate data into File Maker Pro and the Central Files Master List.

Year-End Records Purge

Graduates and Age Majority: Obtain graduate lists from High School Guidance Office and Information Systems Department. All students who graduate (or turn 21 on or before the start of the upcoming school year) have their records removed and sent to off-site filing for a 6-year storage period.

Make a list of age majority students (turning 21 before the first day of school) by sorting Central File Master List by D.O.B. and pasting students into new file called (TBD Year).

For graduating students, get list from High School Guidance Office and from Information Services; compare the list of graduates to the Central Files Master List; copy and paste the students who are graduating into the new “TBD Year” file. Delete the students from the Central Files Master List (the numbers are recycled).
Sort the TBD Year file alphabetically. Use the list to make labels for manila folders (for TBD files going off-site). Use list to pull files from both the Active and Dropped Files. Put files into the previously made manila folders, place files in banker boxes (alphabetically), and label the boxes TBD “Year” and by alphabet (e.g., “TBD 2013: A – Ba”) and keep the old Central File Folders (the numbers will be recycled).

Use the list to enter information into the File Maker Pro by (a) entering the destroy date; (b) the old CF number; and (c) delete the CF number (these are separate fields).

Use list to pull cards from the Index Files and (a) stamp the cards TBD Year; and (b) re-file cards into the TBD Section of the Index Files.

**Destruction of Files**

Three months prior to the destruction of files located in the TBD Off-Site Storage area, a list of these files should be attached to the Waukegan Superintendent’s Request to Destroy Letter sent to the County Superintendent of Schools for approval before they are destroyed.

Also, at this time, a form letter is sent to all affected students advising them of their right to obtain these records for their own safekeeping.

**Filing Documents**

Documents are sorted and placed numerically in filing bins located within the Central Files Office. Documents should be filed within 5 days of arriving in Central Files.

**Checking Out/Removing Central Files**

District employees with offices in Lincoln Center may check out Central Files on a 5-day loan by notifying staff of request, completing a Central File Check Out Card, placing same in that files location.
RELATED SERVICES
Pupil Services

Pupil Services includes the disciplines of psychology, social work, nursing, speech/language pathology, occupational and physical therapy, hearing impaired and visually impaired. These services, all work together to accomplish the school district’s educational goals by helping to meet student’s emotional, mental, social, and physical health needs.

School Psychology

School psychologists help children and youth succeed academically, socially, and emotionally. They collaborate with educators, parents, and other professionals to create safe, healthy, and supportive learning environments for all students that strengthen connections between home and school. Psychologists seek out or try to identify students in need of early intervention for academic and/or behavioral issues. Waukegan Public Schools advocates the delivery of pupil services as a collaborative team and provides training consistent with that idea. School psychology, like other areas of education, is an evolving profession.

Role of a School Psychologist in the Public School Setting

School psychologists play a vital role in all school settings. They work to find the best solution for each student and situation and use different strategies to address student needs and to improve school and district-wide support systems.

School psychologists work with students individually and in groups. They also develop programs to train teachers and parents regarding effective teaching and learning strategies, effective techniques to manage behavior at home and in the classroom, work with students with disabilities or with special talents, abuse of drugs and other substances, and also work on preventing and managing crisis.

If there are significant behavioral difficulties, and a behavior plan has not been effective, psychologists are trained to conduct a Functional Behavior Assessment (FBA), which is more individualized to that student, including further observations, interviews, baseline data, and reviewing the effectiveness of behavioral interventions.

The school psychologist is trained to gather many forms of data, including file reviews, observations, and interviews and interpret the results to better understand a child’s history and current performance. If behavioral and academic difficulties continue after significant intervention strategies have been attempted, the psychologist may interact with members of the referral or problem solving team to decide if a case study evaluation should be initiated.

In addition, most psychologists provide the following services:

CONSULTATION

• Collaborate with teachers, parents and administrators to find effective solutions to learning and behavior problems.
• Help others understand child development and how it affects learning and behavior.
• Strengthen working relationships between teachers, parents and service providers in the community.

EVALUATION
• Evaluate eligibility for special services
• Assess academic skills and aptitude for learning.
• Determine social-emotional development and mental health status.
• Evaluate learning environments.

INTERVENTION
• Provide psychological counseling to help resolve interpersonal or family problems that interfere with school performance.
• Work directly with children and their families to help resolve problems in adjustment and learning.
• Provide training in social skills and anger management.
• Help families and schools manage crisis such as death, illness or community trauma.
• Participate on school problem solving teams to review data and make suggestions for appropriate interventions.

PREVENTION
• Design programs for children at risk of failing at school.
• Promote tolerance, understanding and appreciation of diversity within the school community.
• Develop programs to make school safer and more effective learning environments.
• Collaborate with school staff and community agencies to provide services directed at improving psychological and physical health.
• Develop partnerships with parents and teachers to promote healthy school environments.

RESEARCH AND PLANNING
• Evaluate the effectiveness of academic and behavior management programs.
• Identify and implement programs and strategies to improve schools.
• Use scientifically based research to develop and/or recommend effective interventions.

How to Access Psychology Services

Contact the Building Principal to inform him or her of a particular student’s area of concern. The principal should know if a student might already receive intervention support in the building. The principal also knows which days of the week the school psychologist is in the building.

If a teacher is making the request:

1. Complete a “Classroom Student Consultation Request Form” (a camera ready sample is on the next page) and place it in the psychologist’s school mailbox.

OR

2. Email the psychologist assigned to the building stating the concern.
If a parent is making the request:

1. The parent can call the school psychologist at their child’s school.

   OR

2. A parent can call the Lincoln Center at (847) 360-5580 to schedule an appointment with a school psychologist.

Waukegan Community Unit School District 60
Lincoln Center for Educational Services
1201 N. Sheridan Road
Waukegan, Illinois 60085

Classroom Student Consultation Request Form

Student’s Name: _______________________         CIMS Number: _________________

Date of Birth: ________________________       Today’s Date: _________________

Teacher’s Name: ________________________       Grade: ________________________

Room Number: ________________________       Phone Number: ________________

Reason for Referral:

________________________________________________________________________

Background Information:

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Recommendations Given:
School Social Work

Overview

Social workers are trained to utilize a strength-based, ecological approach that views clients and organizations as parts of systems. The functioning of and relationships within and between systems are enhanced to improve people’s lives. The outcomes for students related to school social work services are increased achievement, safety, attendance, social-behavioral competency, and parent and community involvement. Unlike the vast majority of school staff, school social workers are not trained in a specific field of education. Rather, they are trained primarily and most importantly as masters-level social workers. However, just as high school teachers choose to specialize in a particular subject area, school social workers choose to concentrate their preparation on professional practice within the PreK-12 educational setting.

School Social Work Roles

Many students face barriers to learning that make it difficult for them to be successful in school. These barriers include but are not limited to learning difficulties, mental illness, poverty, racism and other forms of discrimination, alcohol and other drug abuse, child abuse and neglect, homelessness and mobility, domestic and dating violence, and pregnancy. School social workers are masters-level social workers who are trained specifically to work in schools. The focus of their work is to improve the educational outcomes of students, especially students who are experiencing barriers to learning.

School social workers are trained to employ a wide range of professional strategies to enhance how students learn. The roles listed below are best provided within the context or an organized pupil services delivery model.

Assessment & Screening

- IEP Teams
- Building Consultation Teams
- Kindergarten screening
- Depression/suicide screening
- Abuse & neglect screening
- AOD screening

Counseling & Support Groups

- Educational support groups: AOD, anger management, social skills, divorce, etc.
- Individual counseling & problem solving
- Services to pregnant and parenting teens

Crisis Intervention

- Traumatic events
- Family crisis
- Safety
• Suicidal ideation
• Mandate reports of suspected child abuse or neglect

Home-School Collaboration

• Home visits and telephone contacts
• Parent education and support
• Coordination of community resources with school services
• Development and management of collaborative relationships with community agencies
• Referrals to community resources

Services to School Staff

• Consultation and problem solving
• Employee assistance and wellness
• Staff development

Program, Resource & Policy Development

• Curriculum
• Attendance and truancy
• Building and district crisis response
• Programs and services to meet the needs of specific populations: homeless/mobile students, school age parents, ESL students and families, students of color and their families, etc.
• School climate and environment
• Harassment and nondiscrimination
• Discipline, suspension and expulsion
• Grant writing and management
• Confidentiality and release of records

Systems Change to Improve Learning & Support Services

• Within the school
• Between the schools and the greater community
Referral for School Social Work Services

Student referred to Social Work services

- Complete S.W. Referral form
  - No
    - No Action
    - Refer for Community Resources
      - Monitor
  - Yes
    - Services Recommended
      - Obtain Consent if needed
        - Services Continued
        - Services Discontinued
      - Connect student to existing intervention, e.g. Check-n-Connect
    - Crisis based services (up to 3 times)
      - Yes
        - Follow problem-solving procedure to determine intervention (Individual vs. group, length, etc.)
      - No
        - No Action
          - Services Continued
          - Services Discontinued
School Health Services

School nursing is a specialized practice of professional nursing that advances the well-being, academic success, and life-long achievement of students. To that end, school nurses facilitate positive student responses to normal development; promote health and safety; intervene with actual and potential health problems; provide case management services; and actively collaborate with others to build student and family capacity for adaptation, self-management, self-advocacy and learning.

The primary role of the School Nurse is to support student learning. The nurse accomplishes this by implementing strategies that promote student and staff health and safety.

All students may receive services from the School Nurse. Except for extreme emergencies, all students must have a pass before being seen in the nurse’s office. Most direct nursing services are delivered within the nurse’s office, but as needed, may take place in the classroom or other settings as appropriate.

The School Nurse assumes a leadership role in the identification of those students with health needs that interfere with learning by investigating health problems through observation, interviews, and analysis of records.

Depending on other factors, nurses may deliver care to a student through a plan, which is incorporated into a special education student’s IEP, or through a Section 504 Accommodation Plan.

School Nurses are available for consultation to staff and students on matters including health, communicable disease control and prevention, district health policy and procedure, chronic illness/disease management, hearing/vision concerns, healthy school environment, and mandated examination/immunization requirements.

For further information, please contact your building’s school nurse, the district web site, or the School Health Services Coordinator (847) 360-5418.
Referral Process for School Health Services

Student becomes ill/injured

Student tells teacher of illness/injury

Teacher determines whether illness/injury is an appropriate referral to the nurse (Refer to “Faculty guidelines for Utilizing School Health Services” F-142)

Yes

Teacher gives student a pass to nurse

Student goes to the Nurse

Nurse treats student

Student requires further services

Yes

Student is referred to appropriate source (home, MD, hospital)

No

Student returns to class

No

Teacher takes care of situation & student remains in class
Process for Nurse Administration of Physician Ordered Medication/Treatment

Parent/Student notifies nurse of physician recommendation for medication/treatment during school hours.

Nurse explains district procedure to parent/student & gives required forms to parent/student which are to be completed by parent/student/physician (Refer to “Regulations for Prescribed Medications” F-310)

Completed forms & medication/treatment supplies are returned to school nurse by an adult.

Yes
Medications/treatment is administered as ordered.

No
Medication/treatment will not be given. Parent/student will be contacted by nurse to follow-up.
Referral Process for Hearing Screening

Students who are new to the district, being brought to the Building Problem Solving Team, enrolled in special education, or in Kindergarten, first grade, second grade, third grade, fifth grade, eighth grade, or ninth grade will automatically be screened when the hearing technicians are scheduled to be in the student’s building. If a teacher has a concern regarding a student’s ability to hear, they may refer the student to the nurse for hearing screening.

Hearing Screening Conducted

- Passed
  - No further action
  - Passed
  - Student is re-screened
    - Failed
      - Referral is sent to parent(s) & Notification of Failure sent to the teacher & hearing impaired itinerant. (See referral process for hearing impaired students)
Referral Process for Vision Screening

Students who are new to the district, being brought to the Building Problem Solving Team, enrolled in special education, or in Kindergarten, first grade, second grade, third grade, fifth grade, eighth grade, or ninth grade will automatically be screened when the vision technicians are scheduled to be in the student’s building. If a teacher has a concern regarding a student’s ability to see, they may refer the student to the nurse for vision screening.

Referral Process for Vision Screening Diagram

- Vision Screening Conducted
  - Passed
  - Failed

  - Passed
    - Student is re-screened
      - Failed
        - Referral is sent to parent(s) & Notification of Failure sent to the teacher
      - Passed
        - No further action
Speech/Language Services

The definition of speech or language impairment at the federal level appears in IDEA: “a communication disorder, such as stuttering, impaired articulation, a language impairment or voice impairment that adversely affects a child’s performance.” (Section 300.7).

In order to be deemed a handicap, communication impairments must exert an adverse effect on educational performance. Educational performance refers to the ability to participate in the educational process, and must include consideration of the student’s social, emotional, academic, and vocational performance.

One misconception is that any deviance in communication constitutes a handicap. A speech or language deviation does not necessarily constitute an adverse effect on the student’s ability to function in the educational setting any more than deviations like muscle in coordination and poor eyesight necessarily interfere with educational functioning. Similarly, the speech and language impairment must be shown to interfere with the student’s ability to perform in the educational setting before Speech and Language Impaired eligibility is determined.

The effect of the speech and language deviation on social/emotional development must interfere with student’s ability to establish and maintain social relationships and experience sound emotional development. Careful documentation or limitations of social relationships and sound emotional development must be directly linked with the speech and language deviation to establish the existence of an adverse effect on educational performance.

Speech Language service is provided in a wide variety of disability areas:

- Fluency (stuttering)
- Voice (vocal nodules, vocal abuse)
- Articulation/phonological disorder/delay
- Expressive and receptive language disorder/delay
- Augmentative and alternative communication
- Deaf and hard of hearing
- Cognitive impairments
- Pragmatics (social language)
- Cleft palate
- Autism Spectrum Disorders
- Learning disabilities
- Emotional-behavioral disabilities

Speech and Language services shall include, but are not limited to:

- Screening, diagnosis and appraisal of specific speech and language impairments
- Identification of children with speech and/or language impairments
- Referral and follow-up for medical or other professional attention necessary for the habilitation of speech and language impairments
- Planning and developing interventions and programs for children or youth with speech and language impairments
- Provision of services for the habilitation and prevention of speech and language impairments as it relates to successfully accessing the academic curriculum
- Counseling and guidance of parents, children, and teachers regarding speech and language impairments.
Accessing Speech-Language Services

Referral for Speech-Language Screening

SLP conducts screening

Student Passes

SLP completes ISBE form 34-75A “Notification of Decision Regarding Referral”

Student Fails

Is the failure due to articulation/phonology only?

Yes

SLP observes student in the classroom. Teacher &/or SLP implements recommended interventions for 4-6 weeks. SLP evaluates results of the intervention & determines need for further interventions. Refer to the building Problem Solving Team if intervention is unsuccessful.

No

SLP enrolls student in quick articulation/phonology therapy group as RTI process for 6 weeks. Rescreen

Fails Again

SLP conducts a Domain meeting and performs an evaluation
Occupational and Physical Therapy as Educational Therapy

Occupational and/or physical therapy-related services are provided to students with disabilities to help them benefit from the educational process. It is important to identify a student’s need for therapy services in the school setting as opposed to the need for therapy in other settings. Therapy services contribute to the development, improvement, or maintenance of disabled student’s functional level to insure adequate educational instruction.

Related Services (Examples)

The following guidelines are provided in an effort to clarify for educators and therapists the indication for occupational and physical therapy services in the school setting.

1) Student lacks normal basis for sensory-motor development: Occupational and/or Physical Therapy services may be necessary when a student demonstrates problems with the prerequisites of motor skill development and coordination. These prerequisites include, but are not limited to, the following:

A. Muscle tone provides the ability to assume and maintain positions against gravity to voluntarily change positions, and to move freely. Muscle tone is necessary for control and coordination of trunk, legs, and arms.

*Rationale:* Trunk control is necessary for balancing, sitting at a desk, holding up one’s head. Head control is necessary to allow a student to attend to the teacher or to read. Arm control is necessary for writing, breaking a fall, dressing, and eating. Leg control is necessary for walking, moving about the school, running, and independent sitting.

B. Strength and endurance provide the ability to perform expected physical activities without tiring.

*Rationale:* Students whose strength or endurance has been limited by disease or chronic conditions may not be able to keep up with peers and may be unable to complete classroom assignments.

C. Range of motion is the amount of joint movement.

*Rationale:* A limited range of joint movement can lead to deformities, which interfere with functional use of arms, or legs as may be required in the school setting.

D. Reflexes are predetermined, obligatory movements to an outside stimulus. One example would be a startled reaction to an unexpected noise.

*Rationale:* Abnormal reflex activity may interfere with a student’s attention to classroom work, ability to sit safely, ability to look at an object he or she is holding (eye-hand coordination), ability to maintain pencil grasp, and therefore general development of motor skills.
E. Automatic balance responses provide the ability to maintain and/or regain body position during any movement.

*Rationale:* Developing balance is necessary for safe sitting, safe walking, and freely changing positions.

F. Sensory integration is the organization of sensory input for use. The “use” may be a perception of the body or the world, an adaptive response, a learning response, or movement. Through sensory integration, the many parts of the nervous system work together so that a student can effectively interact with the environment and can learn, move, and experience appropriate satisfaction.

*Rationale:* A student must understand/organize information from the environment to use it. For example, a student unable to filter out unnecessary touch information may be highly distracted and unable to attend to the teacher. A student unable to learn from past movement experiences may need excessive energy and attention to relearn a simple motor task (such as holding a pencil) and, therefore, may be unable to have time to do seatwork or to learn to dress.

2) Student lacks functional independence: Occupational and/or physical therapy services may be indicated when a student demonstrates problems in performing functional daily living skills owing to a physical/sensory motor deficit.

A. Mobility includes any method of purposeful movement used to get from one location to another. It may include rolling; crawling; and using a wheelchair, tricycle, crutches, or other aids.

*Rationale:* Mobility is important for active participation and for the ability to act on one’s environment. It is important for a student to move within the classroom or school building, to allow incidental learning, to help develop perception, to develop self-worth, and to allow a student to assume appropriate age-level responsibilities.

B. Fine motor movements include the prerequisites and combinations of movements necessary to be successful and independent in fine motor skills.

*Rationale:* In order to participate effectively in academic tasks, the student must be able to manipulate classroom equipment such as pencils, scissors, books, or assistive devices. This may include effective reaching, hand grasping, and using both hands.

C. Gross motor movements include the prerequisites and combinations of movements necessary to be successful and independent in gross motor skills.

*Rationale:* Balance, muscle tone, strength, and endurance are important prerequisites for gross motor skill development. These are necessary for a student to walk, run, climb stairs, use playground equipment, and participate in games and physical education.
D. Self-help functioning includes the necessary prerequisites and combinations of movements to effectively manage daily living needs such as dressing, eating, and toileting.

*Rationale:* Students who are able to independently and effectively manage their own needs have a greater opportunity to benefit from educational programming. Effective independence in feeding, dressing, and toileting can allow a student to spend more class time focusing on the development of academic skills. Such independence is also important in the development of self-worth and independent living.
Accessing Occupational and Physical Therapy Services

Problem-Solving team assists teacher to determine, implement, & document intervention(s) for 4-6 weeks.

- **Intervention(s) Successful**
  - No Further Action
  - **Intervention(s) Unsuccessful**
    - Problem-Solving team completes and sends OT/PT Dept.’s “Request for Professional Consultation for Problem Solving” form.
      - **Intervention(s) successful**
        - OT &/ or PT provides professional consultation & suggests further interventions to be implemented by educational team for 4-6 weeks
          - **Intervention(s) Unsuccessful**
            - OT/PT Dept. obtains authorization & consents. Initial Evaluation completed upon receipt of proper paperwork

Consults building OT &/or PT regarding environmental accommodations secondary to physical disability

- **Intervention(s) successful**
  - **Intervention(s) Unsuccessful**
    - **Intervention(s) modified & implemented for another 4-6 weeks**
      - **Intervention(s) Unsuccessful**
        - Develop 504 Plan if Regular Education student

Add direct or consultative OT &/or PT services to IEP
Physician Authorization (Referral/Prescription) for Occupational &/ or Physical Therapy Services

1. A Physician Authorization (i.e. referral or prescription) must be received by the OT/PT Department prior to an evaluation being completed by an Occupational Therapist and/or Physical Therapist. A referral may be accepted from the following sources:

   Occupational Therapy
   • Physician
   • Podiatrist
   • Optometrist
   • Advanced Practice Nurse
   • Physician Assistant
   • Dentist

   Physical Therapy
   • Physician
   • Podiatrist
   • Advanced Practice Nurse
   • Physician Assistant
   • Dentist

2. Physical Therapy must also obtain documentation or oral verification of a “current and relevant” diagnosis from any of the sources listed above prior to evaluation and treatment. This diagnosis may stay in effect until changed by one of the above listed sources.

3. A new referral for treatment for either Occupational Therapy or Physical Therapy must be acquired at the beginning of every school year or if there has been a major change in condition, hospitalization, or surgery that impacts the current therapy treatment plan.

The OT/PT Department will attempt to obtain a new referral for treatment and/or evaluation on an annual basis. Four attempts via the US Postal System will be made during a one-year period. If at the end of that time, a current Physician Authorization (referral, prescription) has not been obtained, the services will be discontinued from the student’s IEP.
OT in the Educational Setting

In the public school setting, Occupational Therapy provides a continuum of service to assist students in accessing their educational curriculum. School-based Occupational Therapy is required by law to be educationally relevant. Occupational Therapy intervention can only be considered when:

- A student’s deficit(s) **significantly interferes** with the student’s ability to benefit from his/her educational program.
- The student’s deficit(s) are motor or sensori-motor based.
- Previous documented interventions have been unsuccessful.
- The potential for change is evident.
- The deficits are not of a temporary nature (e.g. broken arm or leg).

- **THE EXPERTISE OF AN OCCUPATIONAL THERAPIST IS REQUIRED.**

Major areas addressed by Occupational Therapy are:

- Fine Motor
- Gross Motor
- Visual Motor/ Visual Perception
- Sensory Processing/ Sensori-motor
- Muscle Strength, Tone, and Endurance
- Self Care Skills
- Independent Living Skills
- Adaptive equipment
- Functional Positioning

Occupational Therapy continuum of service consists of the following modes of service:

- Direct service
- Professional Consultation to educational team
- Monitor
PT in the Educational Setting

In the public school setting, Physical Therapy provides a continuum of service to assist students in accessing their educational curriculum. School-based Physical Therapy is required by law to be educationally relevant. Physical Therapy intervention can only be considered when:

- A student’s deficit(s) **significantly interferes** with the student’s ability to benefit from his/her educational program.
- The student’s deficit(s) are motor or sensori-motor based.
- Previous documented interventions have been unsuccessful.
- The potential for change is evident.
- The deficits are not of a temporary nature (e.g. broken arm or leg).
- **THE EXPERTISE OF A PHYSICAL THERAPIST IS REQUIRED.**

Major areas addressed by Physical Therapy are:
- Gross Motor
- Mobility in the Educational Environment
- Muscle Strength, Tone, and Endurance
- Adaptive Equipment
- Functional Positioning

Physical Therapy continuum of service consists of the following modes of service:
- Direct service
- Professional Consultation to educational team
- Monitor

Consideration of Assistive Technology & Accessing the Assistive Technology Unit

The Assistive Technology Unit (ATU) is the in-district assistive technology team that provides consultation and specialized assistive technology equipment and/or supplies to the educational teams. By law, assistive technology must be considered at every IEP meeting. If during the consideration of assistive technology, the IEP team feels that they are not able to determine what assistive technology, if any, should be considered, a referral to the ATU should be completed and sent to the OT/PT Dept. The referral to the Assistive Technology Unit for consultation (not evaluation) should be documented on the IEP. Referral forms may be downloaded at [www.waukeganschools.org/atu](http://www.waukeganschools.org/atu) in the “Referring a Student” area.

Referrals for assistive technology consultation for a regular education student must be made through the buildings Problem Solving Team by completing the referral form.
Waukegan Public Schools Deaf/Hard of Hearing Program

Philosophy

The Waukegan Deaf/Hard of Hearing Department is designed to serve students who are experiencing educational difficulties due to an identified hearing loss. The program supports the student by addressing the educational needs related to the student’s hearing loss. The teacher is a resource for families and staff and provides the necessary support for the students to reach their maximum potential.

Goals

1. To identify students whose academic progress is impacted by their hearing loss.
2. To provide services to students as dictated by their IEPs.
3. To provide support to nurses and classroom teachers of students with identified hearing losses that do not receive direct service.
4. To assist the classroom teacher and support staff in meeting the needs of the students with hearing losses.
5. To educate families, students, staffs, and the community concerning the nature and implications of hearing loss.

Personnel:

- **Sign language interpreters** are the ears and voices of the deaf students, providing them equal access to the curriculum.
- **Monitors** work with the nurses and classroom teachers to ensure that students who have failed hearing screenings receive services if indicated. Each building has an assigned monitor who is the first person to contact if there are questions regarding a student. (See your nurse for the annual monitor list for your building.)
- **Itinerant teachers** work with students in a continuum of settings, ranging from individual therapy settings to support in the mainstream classroom in order to address goals on the students’ IEPs.
- **Self-contained teachers** work in a classroom with students whose hearing losses and resulting language deficits necessitate an individual or small group setting in order to meet the students’ IEP goals.
- **The audiologist** is contracted by the district to test students’ hearing on an annual basis and also ensures that the students’ hearing related equipment is in good working order.

For questions or information, please contact:

Joan Guilianelli at (847) 599-4264 or jguilianelli@wps60.org.
Referral Process for Suspected Hearing Loss

Hearing/Vision Technician screens student’s hearing

- Passes
  - No Further Action
  - Monitored by Deaf/Hard of Hearing Dept. until no longer indicated
  - H/V Technician completes audiogram & building Nurse refers student to physician
    - Nurse receives medical report & if indicated, completes Action Request for a hearing test by Lake Forest Audiology. Action Request sent to Deaf/Hard of Hearing Dept.
      - Lake Forest does not identify hearing loss
      - Hearing loss identified
    - After approval by Director of SPED, request is sent to Lake Forest. Hearing Test completed by Lake Forest. Result sent to Deaf/Hard of Hearing Dept.

- Fails
  - Student is re-screened by technicians
    - Passes Re-screen
    - Fails Re-screen
      - H/V Technician completes audiogram & building Nurse refers student to physician
        - Nurse receives medical report & if indicated, completes Action Request for a hearing test by Lake Forest Audiology. Action Request sent to Deaf/Hard of Hearing Dept.
          - Lake Forest does not identify hearing loss
          - Hearing loss identified
        - After approval by Director of SPED, request is sent to Lake Forest. Hearing Test completed by Lake Forest. Result sent to Deaf/Hard of Hearing Dept.

Deaf/ Hard of Hearing Dept. takes action as indicated.
Visually Impaired Program

The Waukegan Visually Impaired Program is designed to serve any student who is experiencing educational difficulties due to an identified visual impairment.

Visual impairment means even after correction a child’s visual functioning significantly adversely affects his or her educational performance.

The IEP team may identify a child as having a visual impairment after all of the following events occur:

• A certified teacher of the visually impaired conducts a functional vision evaluation which includes a review of medical information, formal and informal tests of visual functioning and the determination of the implications of the visual impairment on the educational and curricular needs of the child.

• An ophthalmologist or optometrist finds at least one of the following:
  o Central visual acuity of 20/70 or less in the better eye after conventional correction.
  o Reduced visual field to 50° or less in the better eye.
  o Other ocular pathologies that is permanent and irremediable.
  o Cortical visual impairment.
  o A degenerative condition that is likely to result in a significant loss of vision in the future.

• As needed, an orientation and mobility specialist, or teacher or the visually impaired in conjunction with an orientation and mobility specialist, evaluates the child to determine if there are related mobility needs in home, school, or community environments.

• Services may include:
  o Teaching students spatial and environmental concepts and use of information received by the senses (such as sound, temperature and vibrations) to establish, maintain, or regain orientation and line of travel (for example, using sound at a traffic light to cross the street);
  o Teaching students to use the long cane, as appropriate, to supplement visual travel skills or as a tool for safely negotiating the environment for students with no available travel vision;
  o Teaching students to understand and use remaining vision and distance low vision aids, as appropriate; and other concepts, techniques, and tools, as determined appropriate.
  o Teaching students to use current technology such as near and far distant viewers and educational software.
Accessing the Program for the Visually Impaired

Hearing/Vision Technician screens student's vision (General Screen or Referral)

- Passes screening - No further action needed
- Fails Screening - Nurse refers student to MD

School Nurse obtains Ocular Report from MD

Nurse sends Ocular Report to VI Itinerant. VI Itinerant evaluates data including ocular report, staff input, and functional vision assessment if so indicated

- VI Itinerant brings student to building Problem Solving Team to discuss possible interventions
- VI Itinerant schedules IEP meeting in order to provide Special Education service.
Dropping A Related Service
(When Not Part of Re-Evaluation)

Related Service considering discontinuation contacts the student’s Case Manager to schedule a Domain Meeting. The Case Manager completes a Domain Meeting invitation giving at least a 10 calendar days notice. The following participants should be invited to the meeting:
- Parent
- Related Service(s) wanting to conduct an evaluation
- Reg. Ed. Teacher
- SPED Teacher
- LEA (Principal or their designee)

Forms to be completed:
* Domain Meeting Invitation (giving at least 10 calendar days notice)
* Compliance Audit Report PR12

Domain Meeting held with above listed participants. Parent can, in writing, waive the 10 waiting period to start the evaluation.

Forms to be completed:
* Parent/Guardian Consent for Evaluation (ISBE 34-57B) – signed by Parent – 2 pages includes matrix page
* Parental Acknowledgement of Receipt & Explanation of Procedural Safeguards (PR3) signed by parent

Evaluation data collection completed as specified by Domain Matrix page.

Forms to be completed:
* Documentation of Evaluation Results

IEP meeting scheduled & invitation sent with at least a 10 calendar days notice.

Forms to be completed:
* Parent Notification of Conference (ISBE 34-57D)

2 additional attempts made to notify parents of conference date/time via phone, writing, or face-to-face contact. The attempts must be documented on IEP in the IEP Conference Notes section.

IEP Conference Meeting held. If parent is not present, the IEP meeting maybe held if 3 attempts prior to the day of the meeting to notify parents are documented.

Forms to be completed:
* Program Change – SR5 (check for latest revision)
* Parent Notification of Conference Recommendations (ISBE 34-57E)
* IEP should reflect any changes in services
Adding A Related Service  
(When Not Part of Full Case Study or Re-Evaluation)

Evaluation was recommended from Screening/Problem Solving process. Begin Domain meeting process by scheduling a Domain meeting. The Domain meeting must be held within 14 school days from the date of receiving the Referral for Evaluation. The Domain meeting should include the following participants:
- Parent
- Related Service(s) wanting to conduct an evaluation
- Regular Education Teachers
- SpEd Teacher
- LEA (Principal or their designee)

Forms to be completed:
* Domain Meeting Invitation (giving at least 10 calendar days notice)
* Parent Notification of Decision Regarding Referral (ISBE 34-57A)
* Compliance Audit Report

Domain Meeting held with above listed participants. Parent can, in writing, waive the 10 day waiting period to start the evaluation.

Forms to be completed:
* Parent/Guardian Consent for Evaluation (ISBE 34-57B) signed by Parent.
* Parental Acknowledgement of Receipt & Explanation of Procedural Safeguards (PR3) signed by parent.

Evaluation data collection completed as specified by Domain Matrix page.
Forms to be completed:
* Documentation of Evaluation Results

IEP meeting scheduled & invitation sent with at least 10 calendar days notice.
Forms to be completed:
* Parent Notification of Conference (ISBE 34-57D)

2 additional attempts made to notify parents of conference date/time via phone, writing, or face-to-face contact. Attempts must be documented on IEP Conference Notes section.

IEP Conference Meeting held. If parent is not present, IEP may continue on if 3 attempts prior to the day of the meeting to notify parents are documented.
Forms to be completed:
* Program Change-SR5 (check for latest revision)
* Parent Notification of Conference Recommendations (CRF: 44.57F)
**Assistive Technology Device**
Any item, piece of equipment or product system that is used to increase, maintains or improves the functional capabilities of a child with a disability.

**Assistive Technology Service**
Any service that directly assists a child with a disability in the selection, acquisition or use of an assistive technology device, including all of the following:
- Evaluating the needs of the child, including a functional evaluation of the child in the child’s customary environment.
- Purchasing, leasing or otherwise providing for the acquisition of assistive technology devices by children.
- Selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing or replacing of assistive technology devices.
- Coordinating and using other therapies, interventions or services with assistive technology devices, such as those associated with existing education and rehabilitative plans and programs.
- Training or technical assistance for the child or, if appropriate, the child’s family; and
- Training or technical assistance for professionals, including individuals providing education and rehabilitation services, employers or other individuals who provide services to, employ or are otherwise substantially involved in the major life functions of that child.

**Business Day**
Monday through Friday, except for federal and state holidays unless holidays are specifically included in the designation of business day.

**Child**
Any person who is at least three years old but not yet 21 years old and who has not graduated from high school and, for the duration of a school term, any person who becomes 21 years old during that school term and who has not graduated from high school.

**Child with a Disability**
A child who, by reason of any of the following, needs special education and related services:
- Autism
- Deaf-Blindness
- Deafness
- Emotional Disturbance
- Hearing Impairment
- Mental Retardation
- Orthopedic Impairment
- Other Health Impairment
- Specific Learning Disability
- Speech or Language Impairment
- Multiple Disabilities
- Traumatic Brain Injury
- Vision Impairment

**Consent**
- The Parent has been fully informed of all information relevant to the activity for which consent is sought, in his or her native language, or other mode of communication;
- The Parent understands and agrees in writing to the carrying out of the activity for which his or her consent is sought, and the consent describes that activity and lists the records (if any) that will be released and to whom; and
- The Parent also understands the granting of consent is voluntary on the part of the parent and may be revoked at any time. If a parent revokes consent, that revocation is not retroactive (i.e., it does not negate an action that has occurred after the consent was given and before the consent was revoked).
**Controlled Substance**  
A drug or other substance identified under schedules I, II, III, IV, V in section 202 (c) of the Controlled Substance Act [21 U.S.C. 81(c)].

**Day**  
Calendar day unless otherwise indicated as business day or school day.

**Destruction**  
Destruction as used in the section on confidentiality in these policies means physical destruction or removal of personal identifiers from information so the information is no longer personally identifiable.

**Education Records**  
Type of records covered under the definition of “education records” set forth in the regulations implementing the Family Educational Rights and Privacy Act of 1974.

**Evaluation**  
Procedures used to determine whether a child has a disability and the nature and extent of the special education and related services the child needs.

**Extended School Year Services**  
Special education and related services that meet the standards of the State of Illinois and are provided to a child with a disability. These services are provided beyond the normal school year of the local educational agency, in accordance with the child’s individualized education program, and at no cost to the Parents of the child.

**Free Appropriate Public Education**  
Special education and related services that are provided at public expense and under public supervision and direction, meet the standards of the Department of Instruction, include an appropriate preschool, elementary or secondary school education and are provided in conformity with an individualized education program.

**General Curriculum**  
The same curriculum as for non-disabled children.

**Illegal Drug**  
A controlled substance but does not include such a substance that is legally possessed or used under the supervision of a licensed healthcare professional or that is legally possessed or used under any other authority under that Act or under any other provision of federal law.

**Independent Educational Evaluation**  
Means an evaluation conducted by a qualified examiner who is not employed by the public agency responsible for the education of the child in question.

**Individualized Educational Evaluation**  
A written statement for a child with a disability that is developed reviewed and revised.
Native Language
The language normally used by that individual. For children with limited English proficiency, the term means the language normally used by the parents of the child, except that in all direct contact with a child (including evaluation of the child); the term means the language normally used by the child in the home or learning environment. For an individual with deafness or blindness, or for an individual with no written language, the mode of communication is that normally used by the individual (such as sign language, Braille, or oral communication).

Nonacademic and Extracurricular Services and Activities
May include counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the public agency, referrals to agencies that provide assistance to individuals with disabilities and employment by the public agency and assistance in making outside employment available.

Parent
• A natural, adoptive or foster Parent of a child,
• A Guardian, or an individual acting in the place of a natural or adoptive parent (including a grandparent, step-parent, or other relative) with whom the child lives,
• An individual who is legally responsible for the child’s welfare.

Person Acting as a Parent of a Child
A relative of the child or a private individual allowed to act as a Parent of a child by the child’s biological or adoptive Parents or Guardian, and includes the child’s grandparent, neighbor, friend or private individual caring for the child with the explicit or tacit approval of the child’s biological or adoptive parents or guardian. “Person acting as a parent of a child” does not include any person that receives public funds to care for the child if such funds exceed the cost of such care. The local educational agency only permits a foster parent to act as a parent of a child if the natural parents’ authority to make educational decisions of the child’s behalf has been extinguished under state law; and the foster parent has an ongoing, long-term parental relationship with the child, is willing to make the educational decisions required of parents under the Act and has no interest that would conflict with the interests of the child.

Participating Agency
• Participating agency means a state or local agency other than the local educational agency that is financially and legally responsible for providing transition services to the student.
• Participating agency means any agency or institution that collects, maintains or uses personally identifiable information, or from which information is obtained, under the Individuals with Disabilities Education Act.

Personally Identifiable
Information includes the name of the child, the child’s parent or other family member; the address of the child; a personal identifier such as the child’s social security number or student number; or a list of personal characteristics or other information that would make it possible to identify the child with reasonable certainty.

Private School Children with Disabilities
Children with disabilities enrolled by their parents in private schools or facilities.
Qualified
A person has met the Illinois Board of Education approved or recognized certification, licensing, registration, or other comparable requirements that apply to the area in which he/she is providing special education or related services.

Related Services
Transportation and such developmental, corrective and other supportive services as are required to assist a child with a disability to benefit from special education and includes Speech-Language Pathology and Audiology services, Psychological services, Physical and Occupational therapy, recreating, including therapeutic recreation, early identification and assessment of disabilities in children, counseling services, including rehabilitation counseling, orientation and mobility services, and medical services for diagnostic or evaluation purposes. The term also includes school health services, social work services in schools, and parent counseling and training. In this definition:
  • Audiology includes:
    o Identification of children with hearing loss;
    o Determination of the range, nature, and degree of hearing loss including referral for medical or other professional attention for the habilitation of hearing;
    o Provision of habilitative activities such as language habilitation, auditory training, speech reading (lip-reading), hearing evaluation and speech conservation;
    o Creation and administration of programs for prevention of hearing loss;
    o Counseling and guidance of pupils, parents and teachers regarding hearing loss; and
    o Determination of the child’s need for group and individual amplification, selecting and fitting and appropriate aid and evaluating and effectiveness of amplification.

Counseling Services
Services provided by qualified social workers, Psychologists, guidance counselors or other qualified personnel.

Early Identification and Assessment of Disabilities in Children
The implementation of a formal plan for identifying a disability as early as possible in a child’s life.

Medical Services
Services provided by a licensed physician to determine a child’s medically-related disability that results in the child’s need for special education and related services.

Occupational Therapy
  • Improving, developing or restoring functions impaired or lost through illness, injury, or deprivation;
  • Improving ability to perform tasks for independent functioning if functions are impaired or lost; and
  • Preventing, through early intervention, initial or further impairment or loss of function
Orientation and Mobility Services
Services provided to blind or visually impaired students by qualified personnel to enable those students to attain systematic orientation to and safe movement within their environments in school, home, and community, including:

- Teaching students spatial and environmental concepts and use of information received by the senses (such as sound, temperature and vibrations) to establish, maintain, or regain orientation and line of travel (for example, using sound at a traffic light to cross the street);
- Teaching students to use the long cane, as appropriate, to supplement visual travel skills or as a tool for safely negotiating the environment for students with no available travel vision;
- Teaching students to understand and use remaining vision and distance low vision aids, as appropriate; and
- Other concepts, techniques, and tools, as determined appropriate.

Parent Counseling and Training Services
Assisting parents in understanding the special needs of their child and providing parents with information about child development, and helping parents to acquire the necessary skills that will allow them to support the implementation of their child’s individualized education program.

Physical Therapy
Services provided by a qualified physical therapist.

Psychological Services
- Administering Psychological and educational tests, and other assessment procedures;
- Interpreting assessment results;
- Obtaining, integrating, and interpreting information about child behavior and conditions relating to learning;
- Consulting with other staff members in planning school programs to meet the special needs of children as indicated by Psychological tests, interviews, and behavioral evaluations;
- Planning and managing a program of Psychological services, including Psychological counseling for children and parents; and
- Assisting in developing positive behavioral intervention strategies.

Recreation
- Assessment of leisure function
- Therapeutic recreation services
- Recreation programs in schools and community agencies; and
- Leisure education

Rehabilitation Counseling Services
Services provided by qualified personnel in individual or group sessions that focus specifically on career development, employment preparation, achieving independence, and integration in the workplace and community of a student with a disability. The term also includes vocational rehabilitation services provided to a student with disabilities by vocational rehabilitation programs funded under the Rehabilitation Act of 1973, as amended.
**School Health Services**
Services provided by a qualified school nurse or other qualified person.

**Social Work Services**
- Preparing a social or developmental history on a child with a disability;
- Group and individual counseling with the child and family;
- Working with those problems in a child’s living situation (home, school, and community) that affect the child’s adjustment in school;
- Mobilizing school and community resources to enable the child to learn as effectively as possible in his or her educational program; and
- Assisting in developing positive behavioral intervention strategies.

**Speech/Language Pathology Services**
- Identification of children with speech or language impairments;
- Diagnosis and appraisal of specific speech or language impairments;
- Referral for medical or other professional attention necessary for the habilitation of speech or language impairments;
- Provision of speech and language services for the habilitation or prevention of communicative impairments; and
- Counseling and guidance of parents, children, and teachers regarding speech and language impairments.

**Transportation**
- Travel to and from school and between schools;
- Travel in and around school buildings; and
- Specialized equipment (such as special or adapted buses, lifts, and ramps), if required to provide special transportation for a child with a disability.

**Response to Intervention (RTI)**
The “use of a process that determines if (a) child responds to scientific, research-based intervention as part of ...evaluation procedures” for specific learning disabilities. RTI is the practice of providing high quality instruction/intervention matched to student needs in general education and using learning rate over time and level performance to make important educational decisions. Goals of RTI include early intervention and prevention to enhance outcomes for children by providing access to increasingly intense supports, eliminating a “wait to fail” system, and linking instruction to progress monitoring. RTI includes the use of reliable, valid decision procedures and helps address the issue of “poor or inadequate” instruction. Implementation of RTI requires three essential components:
- Multi-tiered models of instruction/intervention
- A problem solving process
- An integrated data collection and analysis system

**School Day**
Any day, including a partial day that children are in attendance at school for instructional purposes. The term “school day” has the same meaning for all children in school, including children with and without disabilities.
**Secondary School**
A nonprofit institutional day or residential school that provides secondary education, except that it does not include any education beyond grade 12.

**Serious Bodily Injury**
Bodily injury which involves a substantial risk of death, extreme physical pain, protracted and obvious disfigurement, or protracted loss or impairment of the function of a bodily member, organ, or mental faculty.

**Special Education**
Specially designed instruction, at no cost to the parents, to meet the unique needs of a child with a disability, includes:

- Instruction conducted in the classroom, in the home, in hospitals and institutions, and in other settings;
- Instruction in physical education;
- Speech/Language Pathology services, or any other related service, if the service consists of specially-designed instruction, at no cost to the parents, to meet the unique needs of a child with a disability, and is considered special education rather than a related service.
- Travel training if it consists of specially-designed instruction, at no cost to the parents, to meet the unique needs of a child with a disability; and
- Vocational education if it consists of specially-designed instruction, at no cost to the parents, to meet the unique needs of a child with a disability.

The terms in the definition of special education are defined as follows:

- **“At no cost”** means that all specially designed instruction is provided without charge, but does not preclude incidental fees that are normally charged to non-disabled students or their parents as a part of the regular education program.
- **“Physical education”** means the development of:
  - Physical and motor fitness;
  - Fundamental motor skills and patterns; and
  - Skills in aquatics, dance, and individual and group games and sports (including intramural and lifetime sports).
  The term includes special physical education, adaptive physical education, movement education and motor development.
- **“Specially-designed instruction”** means adapting content, methodology or delivery of instruction:
  - To address the unique needs of an eligible child under this part that result from the child’s disability and
  - To ensure access of the child to the general curriculum, so he or she can meet the educational standards within the jurisdiction of the public agency that apply to all children.
- **“Travel training”** means providing instruction, as appropriate, to children with significant cognitive disabilities and any other children with disabilities who require this instruction to:
  - Enable them to develop an awareness of the environment in which they live and learn the skills necessary to move effectively and safely from place to place within that environment (e.g., in school, in the home, at work and in the community).
• “Vocational education” means organized educational programs that are directly related to the preparation of individuals for paid or unpaid employment or for additional preparation for a career requiring other than a baccalaureate or advanced degree.

**Substantial Evidence**
Beyond a preponderance of the evidence.

**Summary of Performance**
A written statement that provides post-secondary institutions and agencies a summary of the student’s academic achievement, summary of functional performance as it relates to measurable postsecondary goals, and recommendations on how to assist the student in meeting the student's measurable postsecondary goals.

**Supplementary Aids and Services**
Aids, services and other supports that are provided in regular education classes or other education-related settings, to enable a child with a disability to be educated with non-disabled children to the maximum extent appropriate.

**Transition Services**
A coordinated set of activities for a student with a disability:

- Is designed within an outcome-oriented process that promotes movement from school to post-school activities, including postsecondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living or community participation;
- Includes “post-secondary goals” which means a statement that articulates what the student would like to achieve after high school in at least one of the four following areas: training, education, employment, and independent living.

Is based on the individual student’s needs, taking into account the student’s preferences and interests; and

Includes:
- Instruction;
- Related services;
- Community experiences;

The development of employment and other post-school adult living objectives; and if appropriate, acquisition of daily living skills and functional vocational evaluation.

**Weapon**
Weapon has the meaning given the term “dangerous weapon” under paragraph (2) of the first subsection (g) of section 930 of title 18, United States Code.
Appendix:

A: Parent/guardian Notification of Decision Regarding Referral
B: Referral for English Language Proficiency Evaluation
C: Parent/Guardian Consent for Evaluation
D: Special Education Categories
E: Documentation of Evaluation Results
F: Parent/Guardian Notification of Conference
G: Explanation of Procedural Safeguards
H: Parent/Guardian Acknowledgement of Receipt and Explanation of Procedural Safeguards
I: Eligibility Determination Criteria
J: Eligibility Determination Report
K: Parent/Guardian Notification of Conference
L: Written Agreement to Excuse Team member Attendance at IEP Meeting
M: Parent/Guardian Consent for Initial Special Education Placement
O: Notification of Conference Recommendations & Appendix
P: Parent/guardian Notification of Change of Special Education Placement
Q: Parent Agreement to Amend/Modify Current IEP
R: ESY IEP
S: Individual Service Plan
T: ISBE Form 19-86
U: Waiver of Resolution Session
V: Simple Functional Behavior Assessment & Behavior Intervention Plan
W: Complex Functional Behavior Assessment & Behavior Intervention Plan
X: Determining if Pattern of Suspension Exits
Y: Confidential Folder Sign-Out Log
Z: Status Record
AA: Access Log
BB: Program Change Form
CC: DCFS Reporting Guidelines
Appendix A: Parent/Guardian Notification of Decision Regarding Referral
Appendix C: Parent/Guardian Consent for Evaluation
Appendix D: Special Education Categories

The Special Education Categories site includes information, research, resources, and best practices on the following program areas: Deaf-Blindness, Deafness, Emotional Disturbance, Hearing Impairment, Mental Retardation, Multiple Disabilities, Orthopedic Impairment, Other Health Impairment, Specific Learning Disability, Speech/Language Impairment, Speech/Language Pathology Services, Traumatic Brain Injury, and Visual Impairment. (External Resources are also available.)

▶Autism is a developmental disability significantly affecting verbal and nonverbal communication and social interaction, generally evident before age three that adversely affects a child’s educational performance. (A child who manifests the characteristics of autism after age 3 could be diagnosed as having autism if the other criteria of this Section are satisfied.) Other characteristics often associated with autism are engagement in repetitive activities and stereotyped movements, resistance to environmental change or change in daily routines, and unusual responses to sensory experiences. The term does not apply if a child’s educational performance is adversely affected primarily because the child has an emotional disturbance.

▶Deaf-Blindness means concomitant hearing and visual impairments, the combination of which causes such severe communication and other developmental and educational needs that they cannot be accommodated in special education programs solely for children with deafness or children with blindness.

▶Deafness means a hearing impairment that is so severe that the child is impaired in processing linguistic information through hearing, with or without amplification that adversely affects a child’s educational performance.

▶Emotional Disturbance (includes schizophrenia but does not apply to children who are socially maladjusted, unless it is determined that they have an emotional disturbance) means a condition exhibiting one or more of the following characteristics over a long period of time and to a marked degree that adversely affects a child’s educational performance:

- An inability to learn that cannot be explained by intellectual, sensory, or health factors;
- An inability to build or maintain satisfactory interpersonal relationships with peers and teachers;
- Inappropriate types of behavior or feelings under normal circumstances;
- A general pervasive mood of anxiety or unhappiness or depression; or
- A tendency to develop physical symptoms or fears associated with personal or school problems.

▶Hearing Impairments means impairment in hearing, whether permanent or fluctuating, that adversely affects a child’s educational performance but that is not included under the definition of deafness.
**Mental Retardation** means significantly sub average general intellectual functioning, existing concurrently with deficits in adaptive behavior and manifested during the developmental period that adversely affects a child’s educational performance.

**Multiple Disabilities** means concomitant impairments (such as mental retardation-blindness, mental retardation-orthopedic impairment, etc.), the combination of which causes such severe educational needs that they cannot be accommodated in special education programs solely for one of the impairments. The term does not include deaf-blindness.

**Orthopedic Impairment** means a severe orthopedic impairment that adversely affects a child’s educational performance. The term includes impairments caused by congenital anomaly (e.g., clubfoot, absence of some member, etc.), impairments caused by disease (e.g., Poliomyelitis, bone tuberculosis, etc.), and impairments from other causes (e.g., cerebral palsy, amputations, and fractures or burns that cause contractures).

**Other Health Impairment** means having limited strength, vitality or alertness, including a heightened sensitivity to environmental stimuli, that results in limited alertness with respect to the educational environment that

- is due to chronic or acute health problems such as asthma, attention deficit disorder or attention deficit hyperactivity disorder, diabetes, epilepsy, a heart condition, hemophilia, lead poisoning, leukemia, nephritis, rheumatic fever, or sickle cell anemia; and adversely affects a child’s educational performance.

**Specific Learning Disabilities** means a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, that may manifest itself in an imperfect ability to listen, think, speak, read, write, spell, or do mathematical calculations, including such conditions as perceptual disabilities, brain injury, minimal brain dysfunction, dyslexia, and developmental aphasia. The term does not include learning problems that are primarily the result of visual, hearing or motor disabilities, of mental retardation, of emotional disturbance, or of environmental, cultural, or economic disadvantage. [105 ILCS 5/14-1.03(a)]

**Speech or Language Impairment** means a communication disorder, such as stuttering, impaired articulation, language impairment, or a voice impairment, that adversely affects a child’s educational performance.

**Speech-Language Pathology Services** encompass such activities as:

- Screening, diagnosis and appraisal of specific speech and language impairments;
- Identification of children with speech and/or language impairments;
- Referral and follow-up for medical or other professional attention necessary for the habilitation of speech and language impairments;
- Planning and developing interventions and programs for children or youth with speech and language impairments;
Provisions of services for the habilitation and prevention of speech and language impairments; and

- Counseling and guidance of parents, children, and teachers regarding speech and language impairments.

**Traumatic Brain Injury** means an acquired injury to the brain caused by an external physical force, resulting in total or partial functional disability or Psychosocial impairment, or both, that adversely affects a child's educational performance. The term applies to open or closed head injuries resulting in impairments in one or more areas, such as cognition; language; memory; attention; reasoning; abstract thinking; judgment; problem-solving; sensory, perceptual, and motor abilities; Psychosocial behavior; Psychosocial functions; information processing; and speech. The term does not apply to brain injuries that are congenital or degenerative or to brain injuries induced by birth trauma.

**Visual Impairment** means impairment in vision that, even with correction, adversely affects a child's educational performance. The term includes both partial sight and blindness.
Appendix E: Documentation of Evaluation Results
Appendix F: Parent/Guardian Notification of Conference
Appendix G: Explanation of Procedural Safeguards
Appendix H: Parent/Guardian Acknowledgement of Receipt and Explanation of Procedural Safeguards
Appendix I: Eligibility Determination Criteria
Appendix K: Parent/Guardian Notification of Conference
Appendix L: Written Agreement to Excuse Team Member Attendance at IEP Meeting
Appendix M: Parent/Guardian and Student Notification of Transfer of Rights
Due to Age of Majority
Appendix N: Parent/Guardian Consent for Initial Special Education Placement
Appendix O: Notification of Conference Recommendations & Appendix
Appendix P: Parent/Guardian Notification of Change of Special Education Placement
Appendix Q: Parent Agreement to Amend/Modify Current IEP
Appendix R: ESY IEP
Appendix S: Individual Service Plan
Appendix U: Waiver of Resolution Session
Appendix V: Simple Functional Behavior Assessment & Behavior Intervention Plan
Appendix W: Complex Functional Behavior Assessment & Behavior Intervention Plan
Appendix X: Intervention Follow-up and Evaluation
Appendix Y: Determining if Pattern of Suspensions Exists
Appendix Z: Confidential Folder Sign-out Log

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DOB: _______________________

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Appendix AA: Status Record

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Appendix BB: Access Log

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Appendix CC: Program Change Form
Transmittal Log

When additions, corrections, or deletions are made to the Procedural Manual, entry on this log sheet will assure that everyone’s manual is current.

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Appendix DD: DCSF Reporting

Guidelines for Reporting to Department of Child and Family Services (DCFS)

1. Important numbers: 1-800-25-ABUSE or 1-800-252-2873
   1-800-358-5117 (TTY)
   217-524-2606 If calling from outside of Illinois

2. Hotline operates 24 hours per day, 365 days a year.

3. Reporter must be prepared to provide a phone number where they can be reached throughout the day in case the Hotline needs to call back for more information.

4. Mandated reporters and other persons should call the Hotline when they have reasonable cause to suspect that a child has been abused or neglected. The Hotline worker will determine if the information given by the reporter meets the legal requirements to initiate an investigation.
   - Criteria includes the following:
     - The alleged victim is a child under the age of 18
     - The alleged perpetrator is a parent, guardian, foster parent, relative caregiver, any individual residing in the same home, any person responsible for the child’s welfare through an official capacity or position of trust (for example: health care professionals, support personnel) in settings where children may be subject to abuse and neglect.
     - There is a specific incident of abuse or neglect or a specific set of circumstances involving suspected abuse or neglect.
     - There is demonstrated harm to the child or a substantial risk of physical or sexual injury to the child.

5. Information the reporter should have ready to give to the Hotline:
   - Names, birth dates (or approximate ages), races, genders, etc, for all adult and child subjects.
   - Addresses for all victims and perpetrators, including current location.
   - Information about the siblings or other family members, if available.
   - Specific information about the abusive incident or the circumstances contributing to risk of harm—for example, when the incident occurred, the extent of the injuries, how the child says it happened, and any other pertinent information.
   - If this information in not available, the reporter should not delay a call to the Hotline.