

SPECIAL EDUCATION PLAN DOCUMENTS – IEP/ISP

While there is a lot of variability in the process for creating plans for students, in general, the process for creating IEP/ISP documents for Case Managers is:

1. Create a Meeting Notice
2. Create an Evaluation Plan.
3. Complete Follow up on the Evaluation Plan – get legal guardian’s permission to proceed. An Evaluation Report is automatically created.
4. Evaluators complete their individual reports. If the evaluators feel an IEP is needed, they contribute to the IEP by creating draft items.
5. Incorporate draft items into the report and finalize.
6. Complete Follow-up to Evaluation Report.
7. Create the IEP document and incorporate any draft items from Evaluators.
8. Finalize the IEP and create a Prior Written Notice.
9. Service Providers complete Follow-up Progress Reports.
10. Complete Follow-up to Prior Written Notice.

Please refer to the following sections for details on completing specific parts of the IEP/ISP.

IEP Documents

An IEP (Individualized Education Plan) is typically used for students with special needs. The following table lists the sections required for the IEP document.

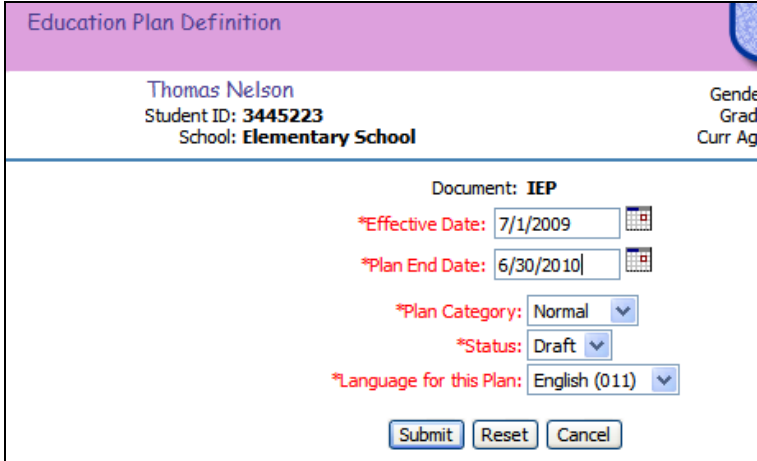
IEP
<ul style="list-style-type: none">• IEP Information• Federal Setting• Residency Information• IEP Student Info• IEP Guardians• Progress Reporting Methods• IEP Progress Report Followup• Disabilities• Spec Ed Services• Related Services• ESY Services• Transfer of Rights• Least Restrictive• Assessment• Record of Proficiency• Extended School Year• Adaptations• Adaptations Detail• Level of Performance• Annual Goals• Post-Secondary Goals• Course of Study• Transition Service Needs

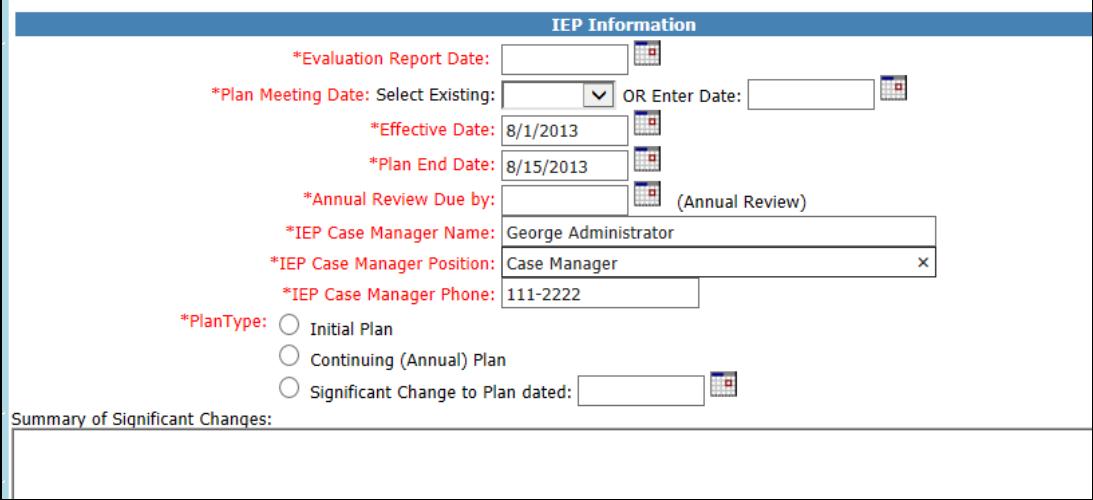
IEP

****DUE PROCESS NOTE:***

For Annual IEP's – back up the due date by four weeks to ensure you will meet and allow the 14 days consideration timeframe. Your effective date is the Deadline Date from the Prior Written Notice. These should match up.

For Initial IEP's - The effective date will also match the Deadline Date from the PWN – however we understand no service can occur before parent permission.

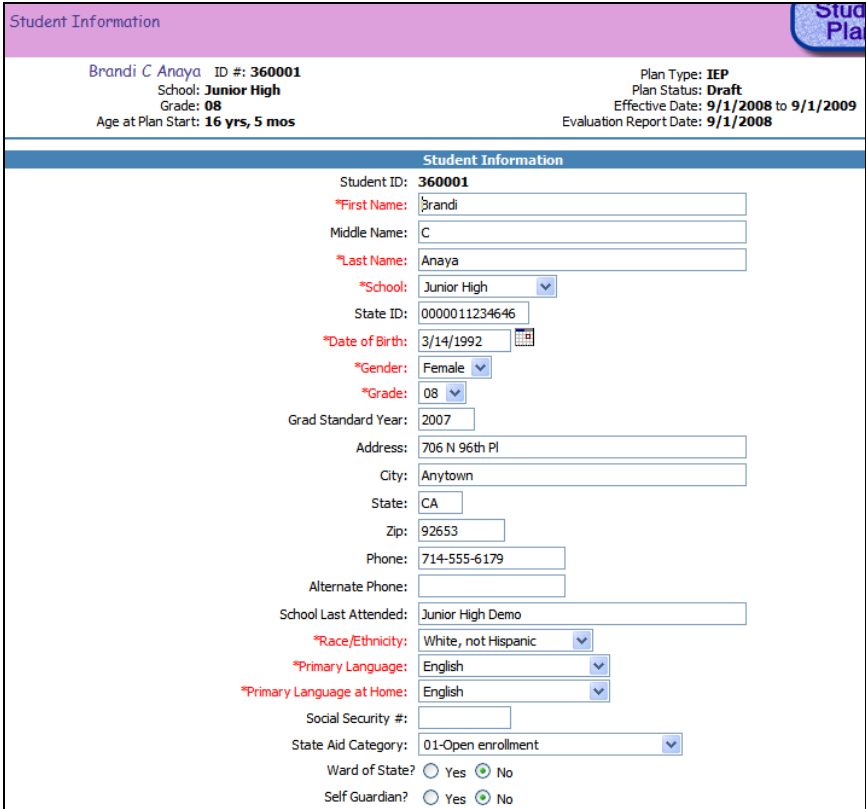
1.	Click the Create New Document link. Input effective date and plan end date. Click submit.	The document date information page is displayed.
		
2.	The next screen displayed depends on how the IEP Menu options have been setup by your administrator. Normally, the IEP information screen is displayed	Note In a new or copied IEP that the evaluation report date, plan meeting date and plan review date are zeroed out and must be selected from a list or keyed in

3.	
4.	<div data-bbox="250 743 854 856">Click in the Evaluation Report Date box and enter the date for an Evaluation Report.</div> <div data-bbox="250 890 854 1033">Click in the other radio buttons, checkboxes, drop-down menus, and text boxes to fill in or change all of the required information.</div> <div data-bbox="880 743 1507 1108">The Evaluation Report date selection box performs a unique function. If evaluators have created draft PLAAFPs and/or draft goals, a drop-down menu will appear, and you must select the evaluation report date from the drop-down menu. This will connect that IEP to the draft parts created by other staff. Typing in the date does not make the internal connection to the draft documents.</div>
5.	<div data-bbox="250 1146 854 1251">If there is an existing 'final' plan, the dates from that plan will show in green above the new Plan Effective Date.</div> <div data-bbox="250 1285 854 1507">If a finalized Meeting Notice exists, a drop down menu will appear allowing you to link to the meeting or you may enter a different date if necessary (use only one or the other). This will link the meeting to the plan in the system.</div> <div data-bbox="880 1146 1507 1436">The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already. If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the document.</div>
6.	<div data-bbox="250 1549 854 1612">Click on the Plan Type radio button and select a plan type if not an initial plan.</div> <div data-bbox="880 1549 1507 1831">Your selection here dictates what you can use when you enter parent permission in the Follow-up section when finalizing a plan: a. Selecting 'Continuing Annual Plan' will allow you to use Signature or Default. b. Selecting Significant Change requires a date of the significant change.</div>

7.	Click the Submit button.	<p>The plan information page is redisplayed with a success message or if there is information missing an error message in red will be displayed at the top of the screen.</p> <p>You can return to this page by selecting IEP Information on the bottom section of the Menu Bar.</p>
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IEP Student Information

1.	On the Menu Bar, click IEP Student Information if menu option is available	The Student Information page is displayed. If the plan is in Draft Status, the data is updated with the data from the last import from the Student Information System.
		
2.	Click in the drop-down menus, radio buttons, and text boxes and fill in or change all of the required information if necessary.	<p>The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already.</p> <p>If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the plan.</p>
3.	Click the Submit button.	The page is redisplayed with a success message.



IEP Guardians

You can work with IEP Guardians in exactly the same way that you work with other Student Guardians in the system. Please refer to the Student Information part of this training guide for details.

1.	On the Menu Bar, click IEP Guardians. Update or add other IEP guardians as needed.	The Parent/Guardian page is displayed.																								
	<div><div><div>Parent/Guardian Information</div><div><div>Brandi C Anaya ID #: 360001</div><div>School: Junior High</div><div>Grade: 08</div><div>Age at Plan Start: 16 yrs, 5 mos</div></div><div><div>Plan Type: IEP</div><div>Plan Status: Draft</div><div>Effective Date: 9/1/2008 to 9/1/2009</div><div>Evaluation Report Date: 9/1/2008</div></div></div><div><div>Parent/Guardian Information</div><div>Update Current Guardians Add Other IEP Guardian</div><table><tr><th>Name</th><th>Relationship</th><th>Type</th><th>Address</th><th>City</th><th>Phone</th><th></th><th></th></tr><tr><td>Mary Anaya</td><td>Mother</td><td>Legal</td><td>706 N 96th Pl</td><td>Anytown</td><td>714-555-7916</td><td>Edit</td><td>Delete</td></tr><tr><td>Mike Anaya</td><td>Father</td><td>Legal</td><td>706 N 96th Pl</td><td>Anytown</td><td>714-555-7916</td><td>Edit</td><td>Delete</td></tr></table></div></div>		Name	Relationship	Type	Address	City	Phone			Mary Anaya	Mother	Legal	706 N 96th Pl	Anytown	714-555-7916	Edit	Delete	Mike Anaya	Father	Legal	706 N 96th Pl	Anytown	714-555-7916	Edit	Delete
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2.	Note: If data is imported in Student Plans from a SIS system that imports Mom and Dad separately, even though they live at the same address, create an additional guardian. Click on add another legal IEP guardian and indicate both Mom and Dad in the same record. Then when creating an attendee list, delete the <u>separate</u> parent entities so that only one meeting notice is sent out.																									



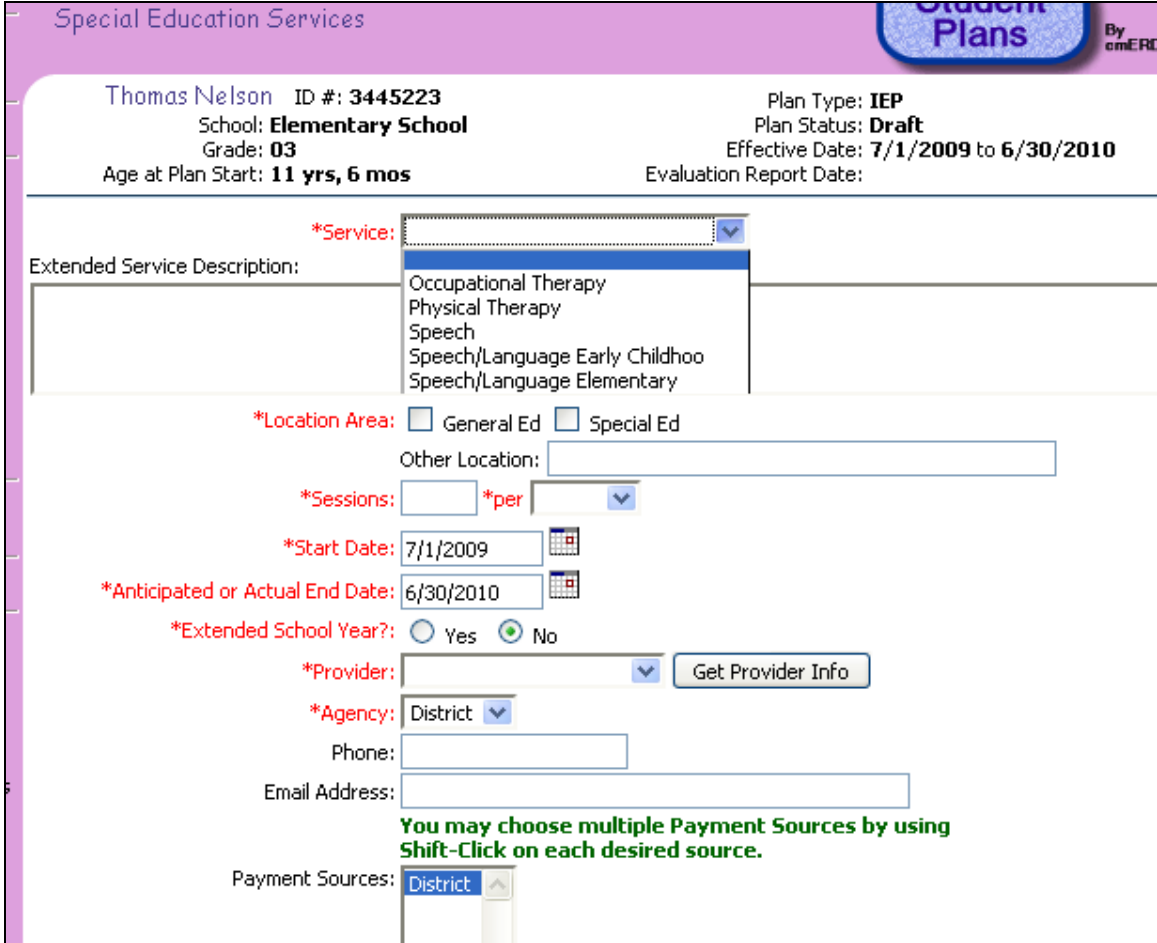
Disabilities



IEP Disabilities populates from the Evaluation Disabilities IF you have finalized the Evaluation documents. If this is not an evaluation year, you will need to select the primary and secondary disabilities.

1.	On the Menu Bar, click Disabilities.	The Disabilities page is displayed.																																																																								
	<div><div>Disabilities</div><div><div>Brandi C Anaya ID #: 360001</div><div>School: Junior High</div><div>Grade: 08</div><div>Age at Plan Start: 16 yrs, 5 mos</div></div><div><div>Plan Type: IEP</div><div>Plan Status: Draft</div><div>Effective Date: 9/1/2008 to</div><div>Evaluation Report Date: 9/1/2008</div></div></div> <table><tr><th colspan="4">Disabilities</th></tr><tr><th>Pri</th><th>Sec</th><th>Code</th><th>Disability</th></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>00</td><td>No IEP, non-disabled student</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>01</td><td>Speech/language impaired</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>02</td><td>Developmental Cognitive Disability: Mild-Moderate</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>03</td><td>Developmental Cognitive Disability:Severe-Profound</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>04</td><td>Physically impaired</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>05</td><td>Deaf - Hard of Hearing</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>06</td><td>Visually impaired</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>07</td><td>Specific learning disabilities</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>08</td><td>Emotional/behavioral disorders</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>09</td><td>Deaf-Blind</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>10</td><td>Other health impaired</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>11</td><td>Autism spectrum disorder</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>12</td><td>Developmental delay</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>12</td><td>Developmental Delay 0-2</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>14</td><td>Traumatic brain injury</td></tr><tr><td><input type="radio"/></td><td><input type="checkbox"/></td><td>16</td><td>Severely multiply impaired</td></tr></table>		Disabilities				Pri	Sec	Code	Disability	<input type="radio"/>	<input type="checkbox"/>	00	No IEP, non-disabled student	<input type="radio"/>	<input type="checkbox"/>	01	Speech/language impaired	<input type="radio"/>	<input type="checkbox"/>	02	Developmental Cognitive Disability: Mild-Moderate	<input type="radio"/>	<input type="checkbox"/>	03	Developmental Cognitive Disability:Severe-Profound	<input type="radio"/>	<input type="checkbox"/>	04	Physically impaired	<input type="radio"/>	<input type="checkbox"/>	05	Deaf - Hard of Hearing	<input type="radio"/>	<input type="checkbox"/>	06	Visually impaired	<input type="radio"/>	<input type="checkbox"/>	07	Specific learning disabilities	<input type="radio"/>	<input type="checkbox"/>	08	Emotional/behavioral disorders	<input type="radio"/>	<input type="checkbox"/>	09	Deaf-Blind	<input type="radio"/>	<input type="checkbox"/>	10	Other health impaired	<input type="radio"/>	<input type="checkbox"/>	11	Autism spectrum disorder	<input type="radio"/>	<input type="checkbox"/>	12	Developmental delay	<input type="radio"/>	<input type="checkbox"/>	12	Developmental Delay 0-2	<input type="radio"/>	<input type="checkbox"/>	14	Traumatic brain injury	<input type="radio"/>	<input type="checkbox"/>	16	Severely multiply impaired
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2.	Click in a radio button to select the primary disability.	One primary disability must be selected in the Pri column.																																																																								
3.	Click in the check boxes to select the secondary disability.	Selecting secondary disabilities in the Sec column is optional. Multiple Secondary disabilities may be selected.																																																																								
4.	Click the Submit button.	The page is redisplayed with a success message.																																																																								

Special Education Services

1.	On the Menu Bar, click Spec Ed Services. Click the Add new Special Education Services link.	The Special Education Services page is displayed.
		
2.	At least one Special Education or Related Services entry is required.	The services displayed in the drop-down box are setup in system template maintenance or district maintenance screen in the services table.

3.	Click in the drop-down menus, checkboxes, and text boxes and fill in or change all of the required information.	<p>The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already.</p> <p>If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the plan.</p> <ul style="list-style-type: none">• The Service descriptions are linked to billing and service time reports.• Extended Service Description can be used to further describe the service. This prints on the IEP. You might choose to use this box if the Service is SLD and you want to further explain to parents that this service time is for Reading.• Location Area - you can select General Ed OR Special Ed.• Sessions and Minutes per Session are used to determine total service hours for reporting purposes and will be used for billing purposes.																				
4.	Click the Submit button.	The Special Education Services page is re-displayed with a success message.																				
5.	Add another service or click the Cancel button.	The Special Education Services table is displayed and the service you added is shown in the list.																				
	<div><div>Special Education Services</div><div><div>Student Plans</div></div><div>Thomas Nelson ID #: 3445223 School: Elementary School Grade: 03 Age at Plan Start: 11 yrs, 6 mos</div><div>Plan Type: IEP Plan Status: Draft Effective Date: 7/1/2009 to 6/30/2010 Evaluation Report Date:</div><div>Special Education Services</div><div>Add new Special Education Services Append Draft Special Education Services</div><table><thead><tr><th>Service Provided</th><th>Provider</th><th>Location Area</th><th>Sess</th><th>Dir Ind</th><th>ESY</th><th>Start Date</th><th>End Date</th><th></th><th></th></tr></thead><tbody><tr><td>Occupational Therapy</td><td>Christine Brunner</td><td>General Ed</td><td>1 per Day</td><td>10</td><td>0</td><td>7/1/2009</td><td>6/30/2010</td><td>Edit</td><td>Delete</td></tr></tbody></table></div>		Service Provided	Provider	Location Area	Sess	Dir Ind	ESY	Start Date	End Date			Occupational Therapy	Christine Brunner	General Ed	1 per Day	10	0	7/1/2009	6/30/2010	Edit	Delete
Service Provided	Provider	Location Area	Sess	Dir Ind	ESY	Start Date	End Date															
Occupational Therapy	Christine Brunner	General Ed	1 per Day	10	0	7/1/2009	6/30/2010	Edit	Delete													

6.	Click the Append Draft Special Education Services link.	The Draft Components screen will display, select a service if there are Draft Services to append by choosing document to append and clicking on the App box
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Document Collaboration

Student Plans By cmERDC

Thomas Nelson
Student ID: 3445223
School: Elementary School

Gender: Male
Grade: 03
Curr Age: 11 yrs, 6 mos

New Services Adaptation Details Adaptation Texts
IEP PLEPs Transition Needs Transition Services
Goals Descriptions of Child S504 Accommodations

All Listed | [List New](#)
[Create New Draft Item](#)
[Choose Service from Existing Plan as Draft](#)

Clear All Flags? ☐ Acknowledge All? ☐ Lock All? ☐ Delete All Appended? ☐ Delete All except Locked? ☐

Choose Document for Appending

Service Provided	Provider	Typ	Location Area	Sess	Dir Ind	IEP: 7/1/2009-6/30/2010 (Draft)	IIIP: 9/4/2007-9/4/2008 (Draft)	IFSP: 7/1/2007-7/31/2007 (Draft)	IFSP: 12/20/2006-12/19/2007 (Draft)	IEP: 9/1/2004-6/29/2005 (Correct)	Dr	Ack	App	Lock	Del
Speech/Language	Don Dremal	SpEd	General Ed	1 per Week	10 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7.	Click the checkboxes next to any draft items that should be included in this plan.	
8.	Click the Submit button. Navigate back to the IEP Services section.	The Special Education Services page is displayed with the draft items added to the table.

Special Education Services

Student Plans

Thomas Nelson ID #: 3445223
School: Elementary School
Grade: 03
Age at Plan Start: 11 yrs, 6 mos

Plan Type: IEP
Plan Status: Draft
Effective Date: 7/1/2009 to 6/30/2010
Evaluation Report Date:

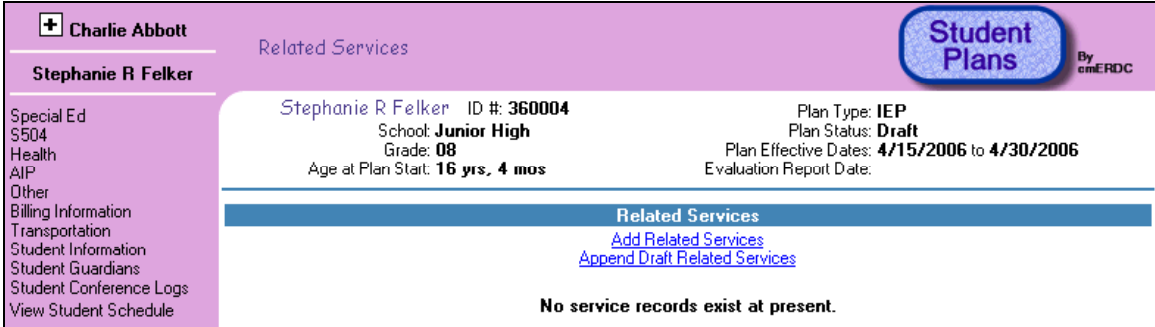
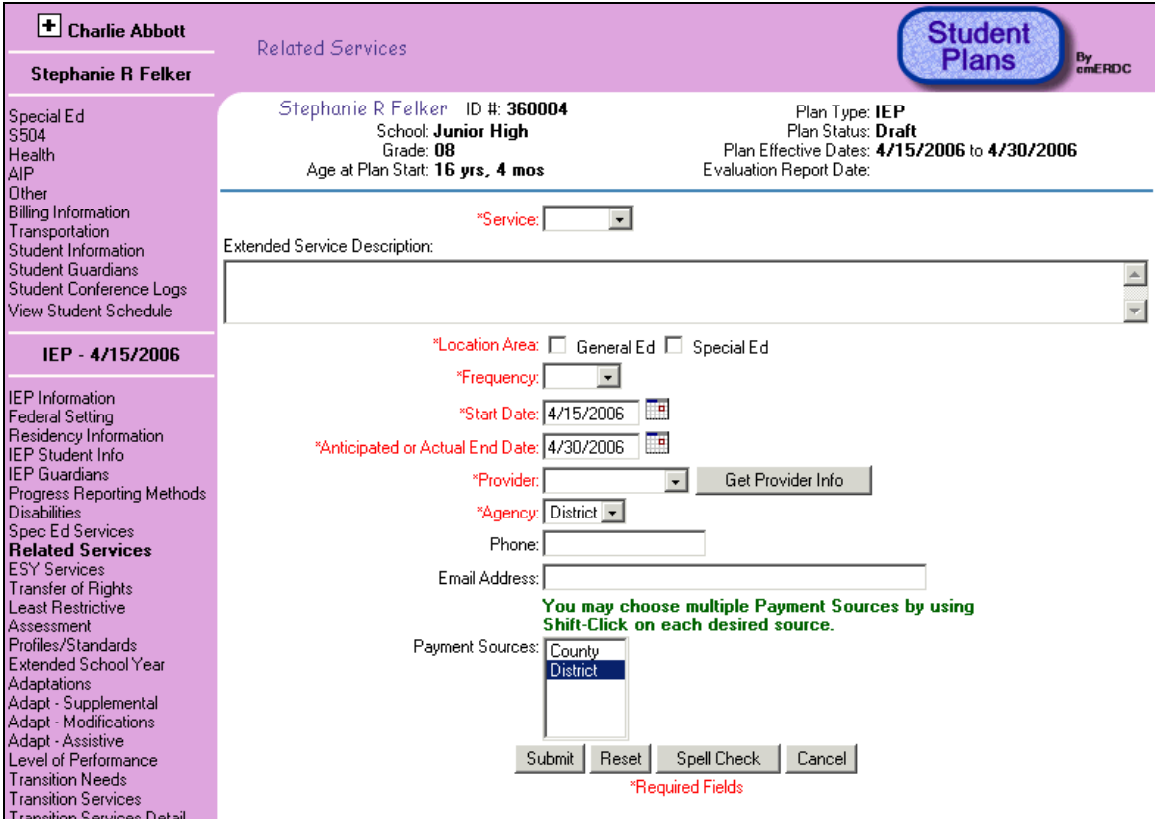
Special Education Services
[Add new Special Education Services](#)
[Append Draft Special Education Services](#)

Service Provided	Provider	Location Area	Sess	Dir Ind	ESY	Start Date	End Date		
Occupational Therapy	Christine Brunner	General Ed	1 per Day	10 0	Y	7/1/2009	6/30/2010	Edit	Delete
Speech/Language	Don Dremal	General Ed	1 per Week	10 0	Y	7/1/2009	6/30/2010	Edit	Delete

9.	Click the Edit link for a draft item you added.	
10.	Modify the information as necessary.	This is exactly the same as when you create new Services as described above.
11.	Click the Submit button.	The Special Education Services page is displayed.
12.	Repeat for all of the draft items you added.	
13.	NOTE: The services screen and corresponding PDF will be sorted by Service End Date and Service	



Related Services

1.	On the IEP Menu Bar, click Related Services, if available.	The Related Services page is displayed.
	 <p>The screenshot shows the 'Related Services' page for Stephanie R Felker (ID: 360004). The page includes a sidebar with navigation links, a header with the student's name and ID, and a main content area. The 'Add Related Services' link is highlighted in the 'Related Services' section.</p>	
2.	Click the Add Related Services link.	The Related Services page is displayed.
	 <p>The screenshot shows the 'Add Related Services' form for Stephanie R Felker (ID: 360004). The form includes fields for Service, Location Area, Frequency, Start Date, End Date, Provider, Agency, Phone, and Email Address. It also has a section for Payment Sources and a 'Submit' button.</p>	

3.	Click in the drop-down menus, checkboxes, and text boxes and fill in or change all of the required information.	<p>The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already.</p> <p>If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the plan.</p>
4.	Click the Submit button.	The Related Services page is re-displayed with a success message.
5.	Click the Cancel button.	The Related Services table is displayed and the service you added is shown in the list.

Charlie Abbott
Stephanie R Felker

Special Ed
S504
Health
AJP
Other
Billing Information
Transportation
Student Information
Student Guardians
Student Conference Logs
View Student Schedule

IEP - 4/15/2006
IEP Information

Related Services

Stephanie R Felker ID #: **360004**
School: **Junior High**
Grade: **08**
Age at Plan Start: **16 yrs, 4 mos**

Plan Type: **IEP**
Plan Status: **Draft**
Plan Effective Dates: **4/15/2006 to 4/30/2006**
Evaluation Report Date:

Related Services
[Add Related Services](#)
[Append Draft Related Services](#)

Service Provided	Provider	Loc Gen	Loc Spec	Freq	Start Date	End Date	
Speech/Language	Maureen Davis		Y	Week	4/15/2006	4/30/2006	Edit Delete

6.	Click the Append Draft Related Services link.	The Document Collaboration page is displayed. All draft services will go under the Services tab.
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Document Collaboration

Thomas Nelson
Student ID: **3445223**
School: **Elementary School**

Gender: **Male**
Grade: **03**
Curr Age: **11 yrs, 6 m**

Services Adaptation Details Adaptation Texts
IEP PLEPs Transition Needs Transition Services
Goals Descriptions of Child S504 Accommodations

All Listed | [List New](#)
[Create New Draft Item](#)
[Choose Service from Existing Plan as Draft](#)

Clear All Flags? ☐ Acknowledge All? ☐ Lock All? ☐ Delete All Appended? ☐ Delete All except L

7.	Click the checkboxes next to any draft items you'd like to include in this plan.	
8.	Click the Submit button. Navigate back to the IEP Related Services section.	The Related Services page is displayed with the draft items added to the table.
9.	Click the Edit link for a draft item you added.	The Related Services information page is displayed.
10.	Modify the information as necessary.	This is exactly the same as when you create new Services as described above.
11.	Click the Submit button	The Related Services page is displayed.
12.	Repeat for all of the draft items you added.	

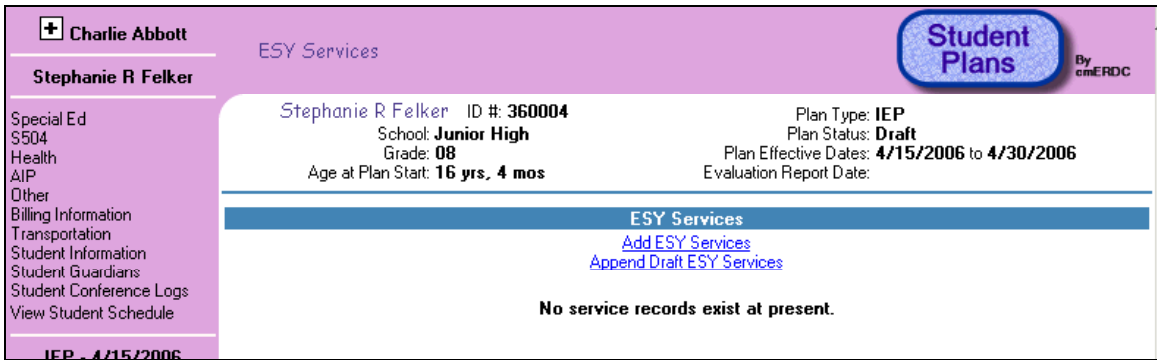


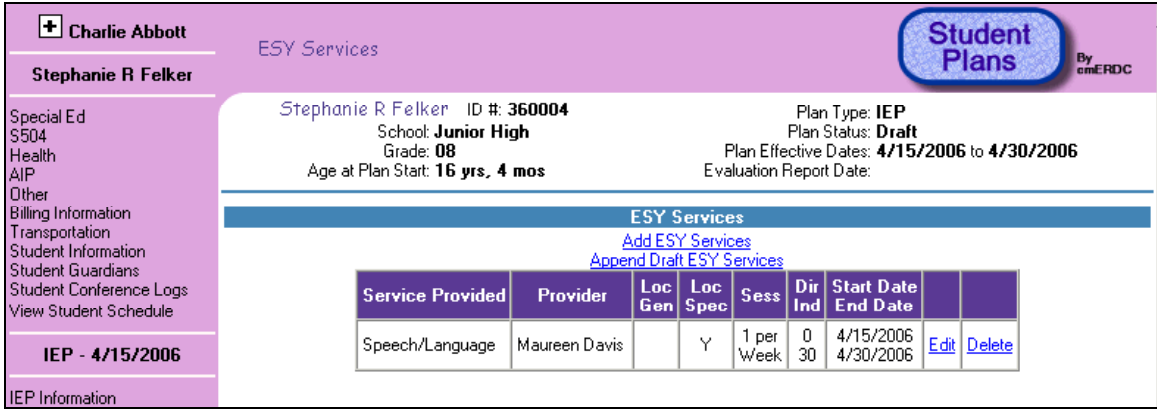
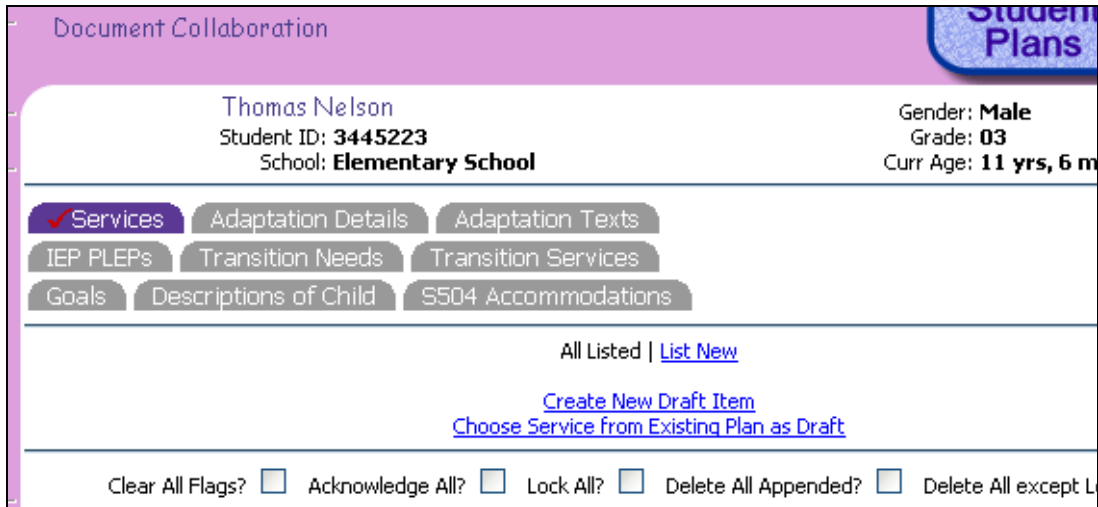
ESY Services

***DUE PROCESS NOTE:**

To consider ESY you MUST have documented data indicating the need for service. For regression/recoupment you should have data at the start of the year, then again a few weeks later; before and after breaks, then a couple weeks later after returning from break.

To consider the other two areas of ESY, please speak with the Director or Assistant Director of Special Education.

1.	On the IEP Menu Bar, click ESY Services, if available.	The ESY Services page is displayed.
	 <p>The screenshot shows the 'ESY Services' page for Stephanie R Felker. The page has a purple header with the student's name and a 'Student Plans' button. Below the header, there is a sidebar with a list of menu items: Special Ed, S504, Health, A/P, Other, Billing Information, Transportation, Student Information, Student Guardians, Student Conference Logs, and View Student Schedule. The main content area displays student information: Stephanie R Felker, ID #: 360004, School: Junior High, Grade: 08, Age at Plan Start: 16 yrs, 4 mos. It also shows plan details: Plan Type: IEP, Plan Status: Draft, Plan Effective Dates: 4/15/2006 to 4/30/2006, and Evaluation Report Date. Below this, there is a section titled 'ESY Services' with two links: 'Add ESY Services' and 'Append Draft ESY Services'. At the bottom, it states 'No service records exist at present.'</p>	
2.	Click the Add ESY Services link.	The ESY Services page is displayed.

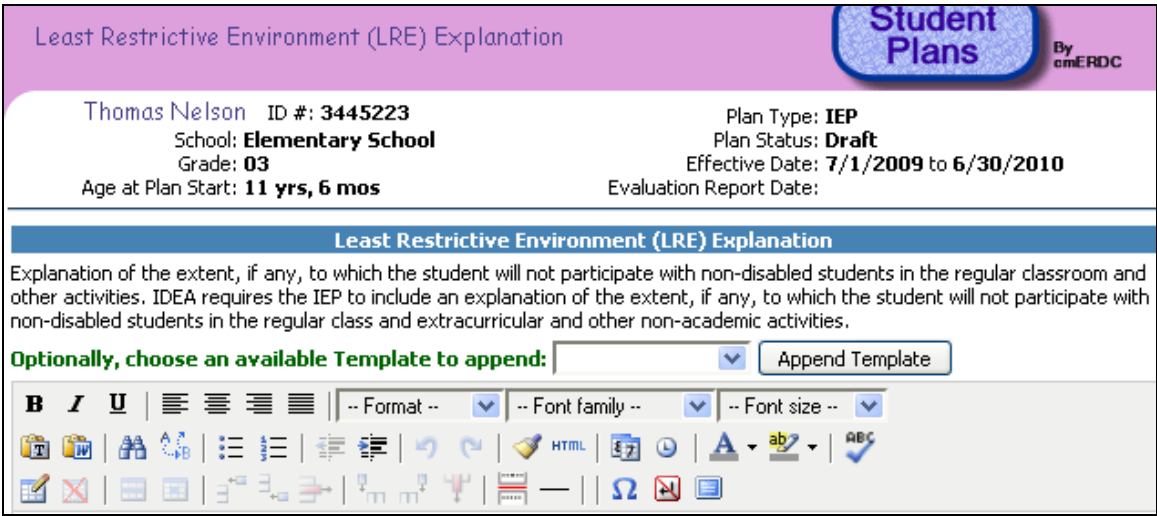
		
6.	Click the Append Draft ESY Services link.	The Document Collaboration page is displayed. All draft services will go under the Services tab.
		
7.	Click the checkboxes next to any draft items you'd like to include in this plan.	
8.	Click the Submit button.	The ESY Services page is displayed with the draft items added to the table.
9.	Click the Edit link for a draft item you added.	The ESY Services information page is displayed.
10.	Modify the information as necessary.	This is exactly the same as when you create new Services as described above.
11.	Click the Submit button	The ESY Services page is displayed.
12.	Repeat for all of the draft items you added.	



Least Restrictive Environment (LRE) Explanation

***DUE PROCESS NOTE:**

You must identify what the student is receiving for direct services, and then what they are missing when receiving that service. For instance, “student receives direct instruction for articulation while peers receive instruction in art twice per week.” Also, consider special events here. For instance, “student receives direct instruction for reading while peers receive social instruction in the general education setting. When special events occur, such as lyceums, pepfests, music concerts and band concerts, student will participate and not receive direct special education services during that time.”

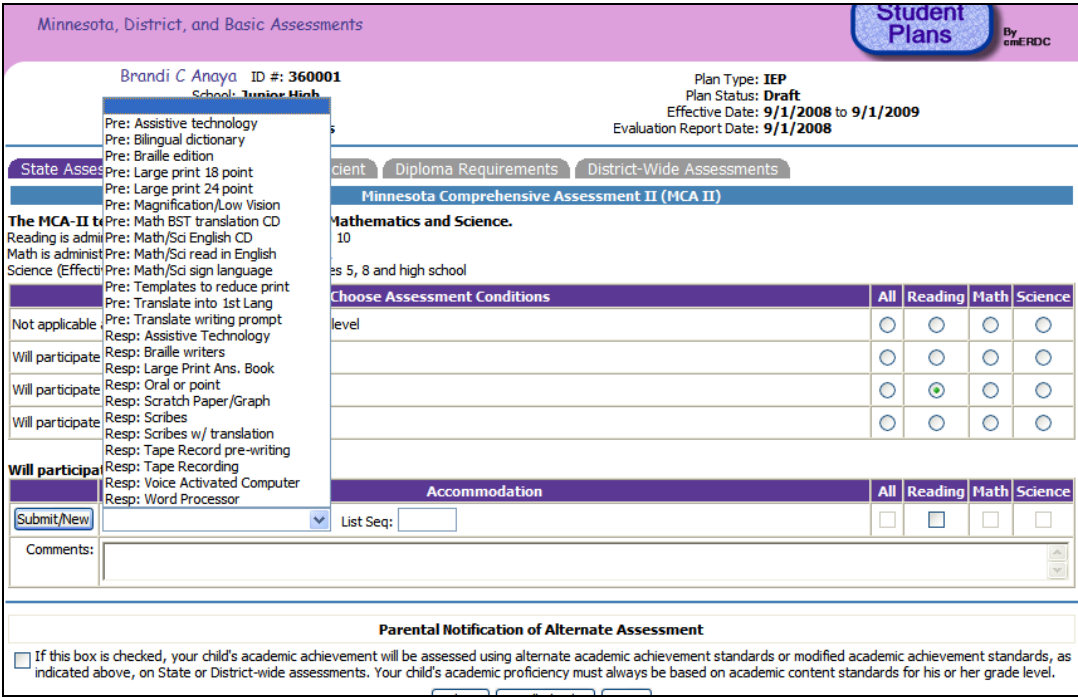
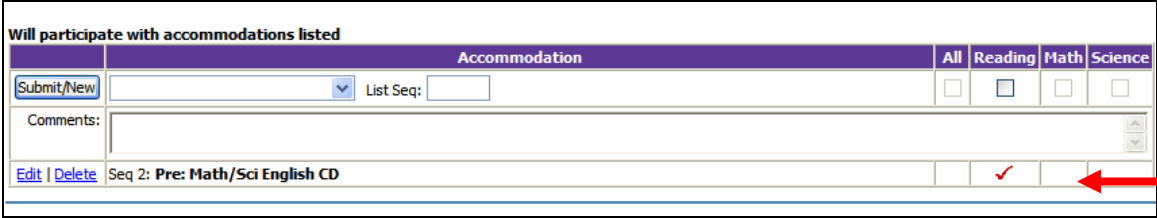
1.	On the Menu Bar, click Least Restrictive.	The Least Restrictive Environment (LRE) Explanation page is displayed.
		
2.	Click on the Template to Append drop-down menu and select a template to use.	This is optional and may be done at any point in the process. If your district has a template set up, it is usually easier to use that than to start from scratch.
3.	Click the Append Template button.	<p>The page is redisplayed with the template information added below whatever other information exists in the text box.</p> <p>Depending on how your templates are set up, you may wish to append several templates back-to-back.</p>

4.	Click in the text box and edit the information as necessary.	See the part of this manual on using the Text Editor for more information.
5.	Click the Submit button.	The page is redisplayed with a success message.



Assessments

1.	On the Menu Bar, click Assessments. Click the tab that will be tested. These screens are customized by the district and may not appear the same.	The Assessments page is displayed with a section for each assessment available for the state and in your district.																									
	<div><div>Minnesota, District, and Basic Assessments</div><div>Student PlansBy cmERDC</div><div>Brandi C Anya ID #: 360001 School: Junior High Grade: 08 Age at Plan Start: 16 yrs, 5 mos</div><div>Plan Type: IEP Plan Status: Draft Effective Date: 9/1/2008 to 9/1/2009 Evaluation Report Date: 9/1/2008</div><div>State AssessmentsLimited English ProficientDiploma RequirementsDistrict-Wide Assessments</div><div>Minnesota Comprehensive Assessment II (MCA II)</div><div>The MCA-II test is administered for Reading, Mathematics and Science. Reading is administered in grades 3, 4, 5, 6, 7, 8 and 10 Math is administered in grades 3, 4, 5, 6, 7, 8 and 11 Science (Effective 2007-2008) is administered in grades 5, 8 and high school</div><table><thead><tr><th>Choose Assessment Conditions</th><th>All</th><th>Reading</th><th>Math</th><th>Science</th></tr></thead><tbody><tr><td>Not applicable at this time or not tested in this grade level</td><td><input checked="" type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Will participate without accommodations</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Will participate with accommodations listed</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Will participate with alternate assessments listed</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr></tbody></table><div>Parental Notification of Alternate Assessment</div><div><input type="checkbox"/> If this box is checked, your child's academic achievement will be assessed using alternate academic achievement standards or modified academic achievement standards, as indicated above, on State or District-wide assessments. Your child's academic proficiency must always be based on academic content standards for his or her grade level.</div></div>		Choose Assessment Conditions	All	Reading	Math	Science	Not applicable at this time or not tested in this grade level	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Will participate without accommodations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Will participate with accommodations listed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Will participate with alternate assessments listed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Choose Assessment Conditions	All	Reading	Math	Science																							
Not applicable at this time or not tested in this grade level	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																							
Will participate without accommodations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																							
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Will participate with alternate assessments listed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																							
2.	Click in the radio button and/or text box to mark the appropriate level of participation for the student.																										
3.	Click the Submit button.	The page is redisplayed with a success message.																									
4.	If the student requires accommodations in a subject, click the appropriate radio button	The Assessment Accommodation page is displayed. If the accommodation is not in the table, it can either be added to the table or it can be typed in the text box.																									
5.	Click on each tab and select the All radio button and Not Applicable if the student does not need that assessment																										

		
6.	Click on the Accommodation drop-down menu and select the appropriate accommodation.	Accommodations may be listed for any/all assessments. This list is customized for your district based on allowable accommodations in your state.
7.	Click in the Sequence # and comments boxes and edit as necessary.	The sequence number is set by default, but you may change it if you want the accommodations to appear in a particular order.
8.	Click the Submit button.	The Assessments page is displayed showing the accommodation selected.
		
9.	Select the Parental Notification of Alternate Assessment if appropriate	



Record of Proficiency

This screen is used to input the scores that a student receives on assessments – this is an **OPTIONAL** form.

1.	Click on Record of Proficiency on the IEP menu	Record of Proficiency in Meeting Diploma Requirements screen is displayed
----	--	---

Record of Proficiency in Meeting Diploma Requirements

Thomas Nelson ID #: 3445223
School: Elementary School
Grade: 03
Age at Plan Start: 11 yrs, 6 mos

Plan Type: IEP
Plan Status: Draft
Effective Date: 7/1/2009 to 6/30/2010
Evaluation Report Date:

	Date Passed State		Date Passed Individual	Individual Score
Minnesota Comprehensive Assessment II (MCA II)				
Reading	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Mathematics	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Science	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Limited English Proficiency (LEP)				
Reading/Writing	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Listening/Speaking	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Mathematics	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Graduation Required Assessments for Diploma (GRAD)				
Reading	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Mathematics	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Writing	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Basic Skills Test (BST)				
Reading	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Writing	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>
Mathematics	<input type="text"/>	OR	<input type="text"/>	<input type="text"/>



Annual Goals

There are a number of ways to put goals and objectives together:

- Use the Goal Library and choose both the goal and objectives.
- Choose to write your own goal and then search the library just for an objective.
- Select a goal from the library and write your own objectives.

The following procedure walks through all of the elements, but they can be combined in different ways.

****DUE PROCESS NOTE:***

Whether you use the library or write your own, you must still meet the due process requirements for goal/objective writing. A goal must include the following: skill/behavior to change, direction, and expected annual ending level. An objective must include the following: skill/behavior to change, conditions, criteria and evaluation procedures. A goal MUST have a minimum of two objectives.

Example Goal:

Johnny will increase his basic reading skills from consistently reading Dolch sight words with 54% accuracy to reading them consistently with 90% accuracy.

Johnny will decrease blurting out behaviors from 5 times per (day/class/session) to blurting out two or fewer times per (day/class/session).

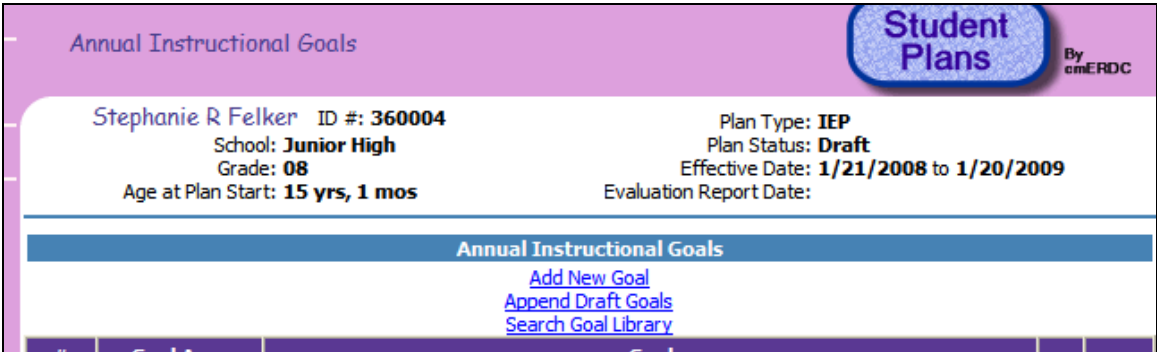
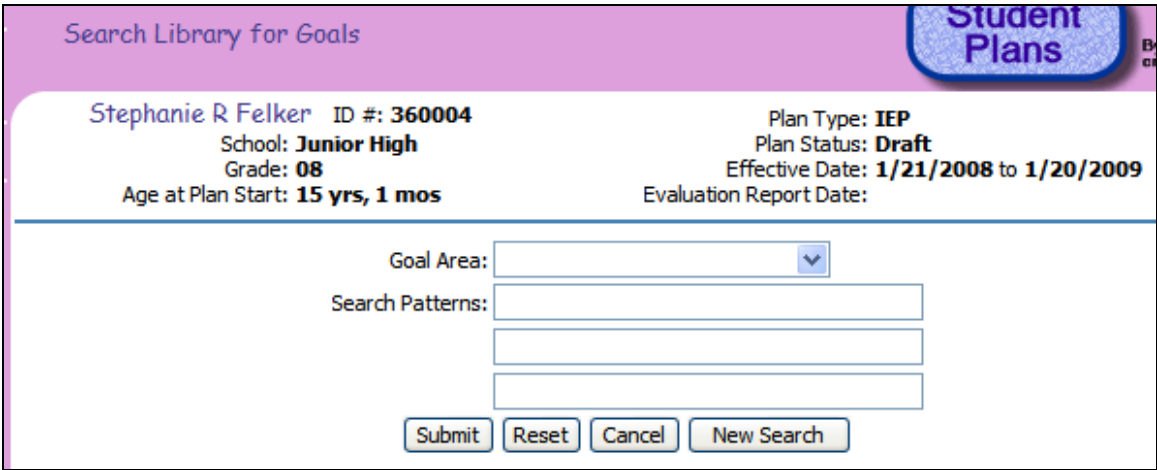
Example Objectives:

Given a list of the first 100 Dolch sight words, Johnny will read them with 90% accuracy, on three consecutive trials.

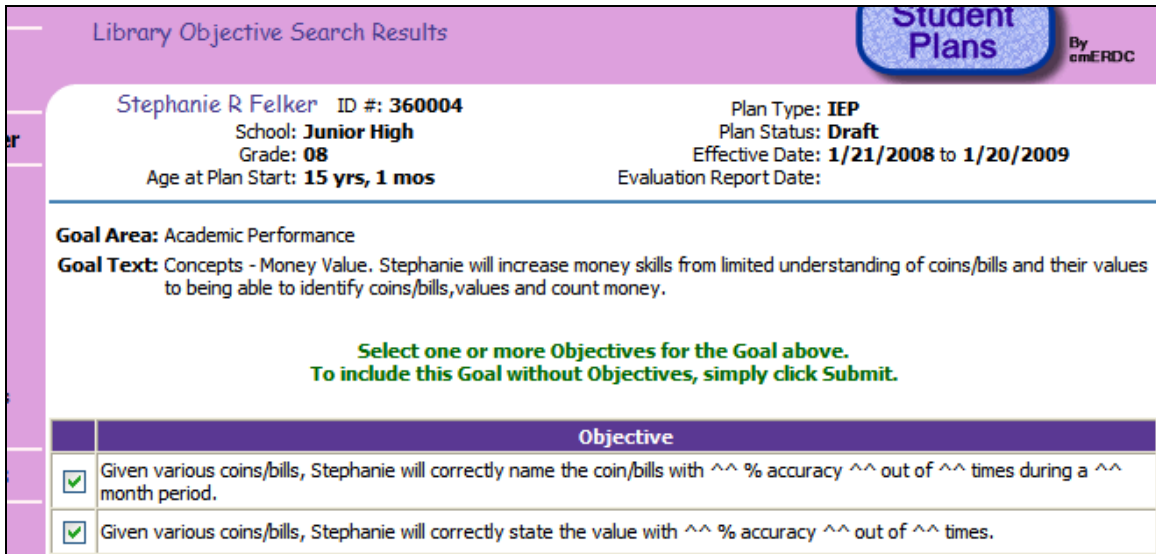
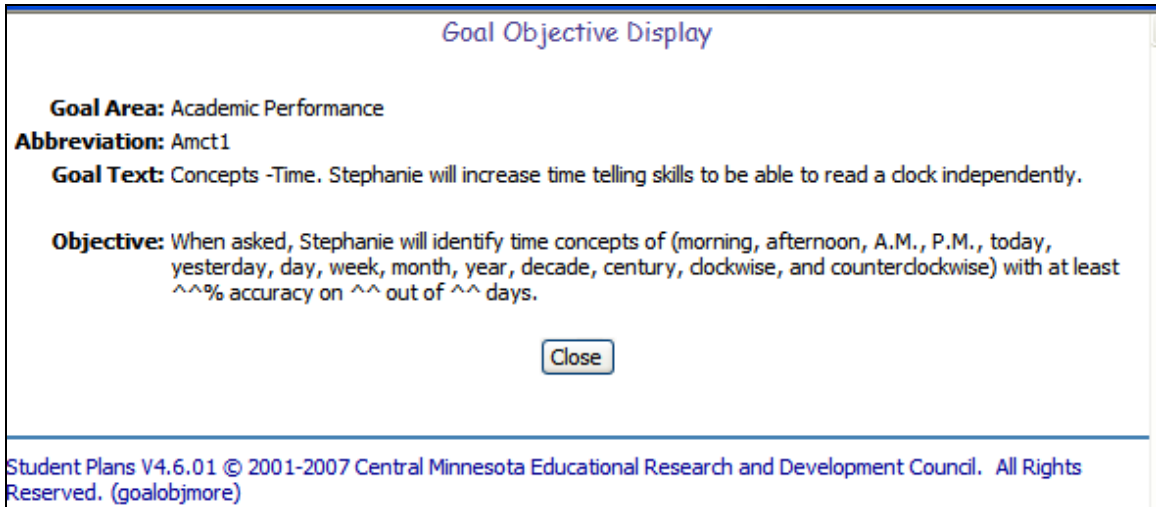
Given a classroom session, Johnny will raise his hand before making a request 8 of 10 random observations completed by special education staff.

Adding Goals Using Goal Library

1.	On the Menu Bar, click Annual Goals.	The Annual Instructional Goals page is displayed.
----	--------------------------------------	---

		
2.	Click the Search Goal Library link.	
		
3.	Click on the Goal Area drop-down menu and select the desired Goal Area.	
4.	Click in the search patterns boxes and add additional search criteria as you wish.	These are optional and can be used to narrow your search. Enter one key word in each box.
5.	Click the Submit button.	<p>The Goal Library Search Results page is displayed.</p> <p>Note that only a portion of the Goal text is included in the table.</p>

	<div> <div>Goal Library Search Results</div> <div> <div>Student Plans</div> <div>By cmERDC</div> </div> </div> <div> <div>Stephanie R Felker ID #: 360004</div> <div>Plan Type: IEP</div> <div>School: Junior High</div> <div>Plan Status: Draft</div> <div>Grade: 08</div> <div>Effective Date: 1/21/2008 to 1/20/2009</div> <div>Age at Plan Start: 15 yrs, 1 mos</div> <div>Evaluation Report Date:</div> </div> <table border="1"> <thead> <tr> <th></th><th>Goal Area</th><th>Goal</th></tr> </thead> <tbody> <tr> <td><input type="radio"/></td><td>Academic Performance</td><td>Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity ... more</td></tr> <tr> <td><input checked="" type="radio"/></td><td>Academic Performance</td><td>Concepts -Time. Stephanie will increase time telling skills to be able to read a clock independently.</td></tr> </tbody> </table>			Goal Area	Goal	<input type="radio"/>	Academic Performance	Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity ... more	<input checked="" type="radio"/>	Academic Performance	Concepts -Time. Stephanie will increase time telling skills to be able to read a clock independently.
	Goal Area	Goal									
<input type="radio"/>	Academic Performance	Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity ... more									
<input checked="" type="radio"/>	Academic Performance	Concepts -Time. Stephanie will increase time telling skills to be able to read a clock independently.									
6.	Click the “more” link for one of the Goals.	The full text will be displayed in an Instructional Goal Display pop-up window.									
	<div> <div>Instructional Goal Display</div> <div> <div>Goal Area: Academic Performance</div> <div>Abbreviation: Amcm1</div> <div>Goal Text: Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity and temperature.</div> <div>Close</div> </div> </div> <div>Student Plans V4.6.01 © 2001-2007 Central Minnesota Educational Research and Development Council. All Rights Reserved. (goalmore)</div>										
7.	Click the close button.	The pop-up window closes.									
8.	Click in a radio button to select the Goal you wish to use in this plan.										
9.	Click the Submit button.	<p>The Goal Library Objective Search Results page is displayed.</p> <p>Note that only a portion of the Goal Objective text is included in the table.</p>									

		
10.	Click the “more” link for one of the Goal Objectives.	The full text will be displayed in an Instructional Goal Objective Display pop-up window.
		
11.	Click the close button.	The pop-up window closes.
12.	Click in the checkboxes to select the Goal Objectives you wish to include in this plan.	You may select as many as you wish.
13.	Click the Submit button.	The goal information page is displayed with the Goal and Objectives added to the Goal you were working on.

Adding Goals Manually

1. Click the Add New Goal link.

A blank goal information page is displayed. In this case the Present Level section is included so that the case manager can write a Present Level description for that annual goal.

The screenshot shows the 'Annual Instructional Goals' page in the Student Plans software. The interface includes a left sidebar with a navigation menu, a top header with user and plan information, and a main content area for goal entry.

Left Sidebar:

- Sign Off
- 0011 Administrator
- Stephanie R Felker
- Special Ed
- S504
- Health
- AIP
- Other
- Billing Information
- Transportation
- Student Information
- Student Guardians
- Student Conference Logs
- View Student Schedule
- IEP - 1/21/2008
- IEP Student Info
- Residency Information
- IEP Guardians
- IEP Information
- Federal Setting
- Progress Reporting Methods
- Extended School Year
- Spec Ed Services
- Related Services
- ESY Services
- Least Restrictive
- Level of Performance
- Annual Goals**
- Assessment
- Disabilities
- Profiles/Standards
- Adaptations
- Adapt - Supplemental
- Adapt - Modifications
- Adapt - Assistive
- Adaptations Detail
- Adapt - Supplemental Detail
- Adapt - Modifications Detail
- Adapt - Assistive Detail
- Transition Needs
- Transition Services
- Transition Services Detail
- Transfer of Rights
- General Notes
- IEP
- User Section 2
- User Section 3
- User Section 4
- User Section 5
- User Section 6
- User Section 7
- User Section 8
- User Section 9
- Check Completeness
- Print IEP (pdf)

Top Header:

- Stephanie R Felker ID #: 360004
- School: Junior High
- Grade: 08
- Age at Plan Start: 15 yrs, 1 mos
- Plan Type: IEP
- Plan Status: Draft
- Effective Date: 1/21/2008 to 1/20/2009
- Evaluation Report Date:

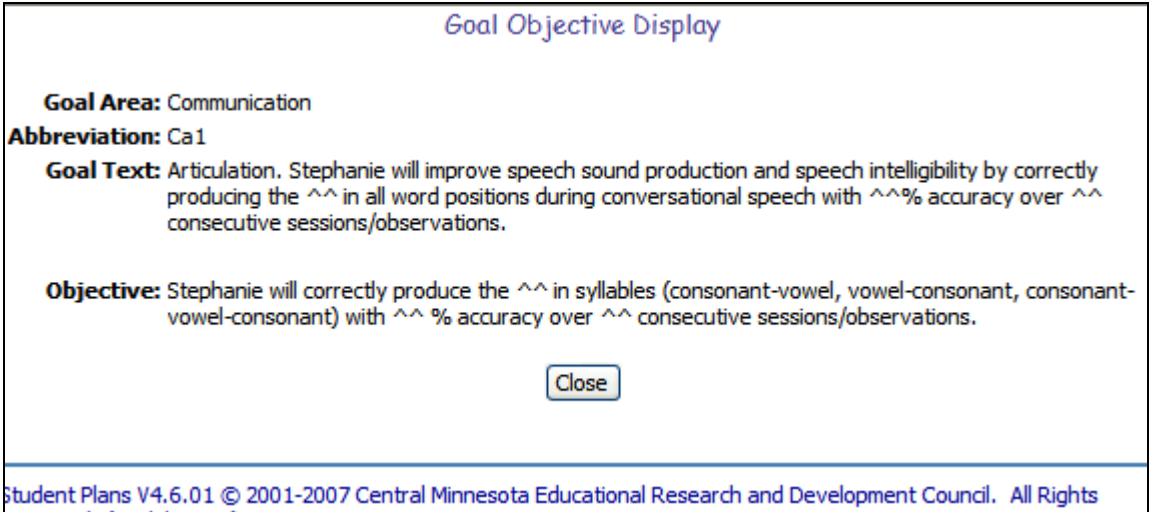
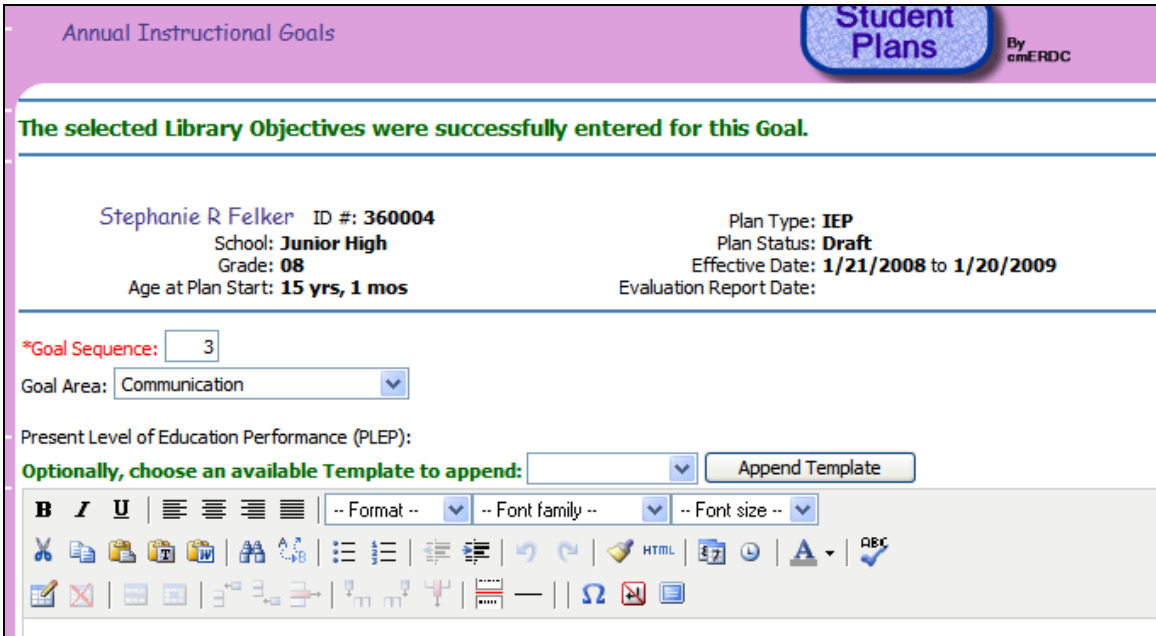
Main Content Area:

- *Goal Sequence: 3
- Goal Area: [Dropdown]
- Present Level of Education Performance (PLEP):
- Optionally, choose an available Template to append: [Dropdown] Append Template
- Rich text editor toolbar with options: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Font Color, Background Color, Font Family, Font Size, Undo, Redo, Print, and a checkbox for 'GBC'.
- Path: [Text Box]
- Version: 2.1.0
- *Goal Text:
- Each Goal should include three components: Skill/behavior to be changed, Direction of change, Expected annual ending level of performance.
- Optionally, choose an available Template to append: [Dropdown] Append Template
- Rich text editor toolbar (same as above).
- Path: [Text Box]
- Version: 2.1.0
- *Objectives (each Goal must have at least two Objectives):
- Each Objective should include: Skill to be performed, Conditions for evaluation, Criteria for evaluation, Evaluation procedures.
- Objective Sequence: 1 (new)
- Objective Sequence: 2 (new)
- Buttons: Submit and Display Goal List, Submit and Add Another Goal, Submit and Add More Objectives, Spell Check, Reset, Cancel.
- *Required Fields


Footer: Student Plans V4.6.01 © 2001-2007 Central Minnesota Educational Research and Development Council. All Rights Reserved. (plangoalinfo)

2..	Click in the Goal box and enter a sequence number if not already there.	These are filled in by default, but if you wish to set the sequence manually, you may do so.
3.	Click on the Goal Area drop down menu and select the appropriate goal area.	
4.	For IEPs, in the Present Level of Education Performance (PLAAFP) section, click on the Template to Append drop-down menu and select a template to use.	This is optional and may be done at any point in the process. If your district has a template set up, it's usually easier to use that than to start from scratch.
5.	Click the Append Template button.	<p>The page is redisplayed with the template information added below whatever other information exists in the text box.</p> <p>Depending on how your templates are set up, you may wish to append several templates back-to-back.</p>
6.	Click in the text box and edit the information as necessary.	<p>See the part of this manual on using the Text Editor for more information.</p> <p>Replace any ^ symbols with a measurable outcome. The document cannot be finalized if any ^ are still present in the goals/objectives. The % is not checked, but a valid number should be placed before each of the % symbols as necessary.</p>
7.	In the Goal Text and Objectives sections, click in the text boxes and enter the appropriate information.	<p>Refer to the onscreen instructions for more details on what to include.</p> <p>If you wish to add additional objectives to the list, click the Submit and Add More Objectives button.</p>
8.	Click the Search Goal Library for Objectives link.	The Search Library for Instructional Goal Objectives page is displayed including the Goal Area you previously selected.

	<div> <div>Search Library for Objectives</div> <div> <div>Student Plans</div> <div>By cmERDC</div> </div> </div> <div> <div> Stephanie R Felker ID #: 360004 School: Junior High Grade: 08 Age at Plan Start: 15 yrs, 1 mos </div> <div> Plan Type: IEP Plan Status: Draft Effective Date: 1/21/2008 to 1/20/2009 Evaluation Report Date: </div> </div> <hr/> <div> <div>Goal: #3</div> <div>Goal Area: Communication</div> <div>Goal Text:</div> </div> <div> <div>Search Goal Area:</div> <div>Communication</div> </div> <div> <div>Goal Search Patterns:</div> <div> <div>Optionally, enter Goal Text search patterns to only search for Objectives associated with selected Goals.</div> <div>Improve</div> <div></div> <div></div> </div> </div> <div> <div>Objective Search Patterns:</div> <div> <div>Optionally, enter Objective Text search patterns</div> <div></div> <div></div> <div></div> </div> </div> <div> <div>Submit</div> <div>Reset</div> <div>Cancel</div> <div>New Search</div> </div>							
9..	Enter additional search criteria.							
10.	Click the Submit button.	<p>The Goal Library Objective Search Results page is displayed.</p> <p>Note that only a portion of the Goal Objective text is included in the table.</p>						
	<div> <div>Objective Search Results</div> <div> <div>Student Plans</div> <div>By cmERDC</div> </div> </div> <div> <div> Stephanie R Felker ID #: 360004 School: Junior High Grade: 08 Age at Plan Start: 15 yrs, 1 mos </div> <div> Plan Type: IEP Plan Status: Draft Effective Date: 1/21/2008 to 1/20/2009 Evaluation Report Date: </div> </div> <hr/> <div> <div>Goal: #3</div> <div>Goal Area: Communication</div> <div>Goal Text:</div> </div> <div> <div>Select one or more Objectives for the Goal above.</div> </div> <table border="1"> <thead> <tr> <th></th> <th>Objective</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Stephanie will correctly produce the ^^ in isolation with ^^% accuracy over ^^ consecutive sessions/observations.</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Stephanie will correctly produce the ^^ in syllables (consonant-vowel, vowel-consonant, consonant-vowel-consonant) with ^^ % accuracy over ^^... more</td> </tr> </tbody> </table>			Objective	<input checked="" type="checkbox"/>	Stephanie will correctly produce the ^^ in isolation with ^^% accuracy over ^^ consecutive sessions/observations.	<input checked="" type="checkbox"/>	Stephanie will correctly produce the ^^ in syllables (consonant-vowel, vowel-consonant, consonant-vowel-consonant) with ^^ % accuracy over ^^... more
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<input checked="" type="checkbox"/>	Stephanie will correctly produce the ^^ in syllables (consonant-vowel, vowel-consonant, consonant-vowel-consonant) with ^^ % accuracy over ^^... more							

11.	Click the “more” link for one of the Goal Objectives.	The full text for will be displayed in an Instructional Goal Objective Display pop-up window.
		
12.	Click the close button.	The pop-up window closes.
13.	Click in the checkboxes to select the goals you wish to include in this plan.	
14.	Click the Submit button.	The goal information page is redisplayed with the Goal Objectives added to the Goal you were working on.
		

15.	Click the Submit and Display Goal List button.	The Goal List is displayed with a success message.															
	<div><div>Annual Instructional Goals</div><div>Student Plans By emERDC</div><div>The Information was successfully changed.</div><div>Stephanie R Felker ID #: 360004 School: Junior High Grade: 08 Age at Plan Start: 15 yrs, 1 mos</div><div>Plan Type: IEP Plan Status: Draft Effective Date: 1/21/2008 to 1/20/2009 Evaluation Report Date:</div><div>Annual Instructional Goals</div><div>Add New Goal Append Draft Goals Search Goal Library</div><table><thead><tr><th>#</th><th>Goal Area</th><th>Goal</th><th></th><th></th></tr></thead><tbody><tr><td>1</td><td>Academic Performance</td><td>Concepts - Money Value. Stephanie will increase money skills from limited understanding of coins/bills and their values to being able to identify coins/bills, values and count money.</td><td>Edit</td><td>Delete</td></tr><tr><td>2</td><td>Academic Performance</td><td>Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity and temperature.</td><td>Edit</td><td>Delete</td></tr></tbody></table></div>		#	Goal Area	Goal			1	Academic Performance	Concepts - Money Value. Stephanie will increase money skills from limited understanding of coins/bills and their values to being able to identify coins/bills, values and count money.	Edit	Delete	2	Academic Performance	Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity and temperature.	Edit	Delete
#	Goal Area	Goal															
1	Academic Performance	Concepts - Money Value. Stephanie will increase money skills from limited understanding of coins/bills and their values to being able to identify coins/bills, values and count money.	Edit	Delete													
2	Academic Performance	Concepts - Measurement. Stephanie will increase measurement skills to measure various attributes using standard measures of length, weight, capacity and temperature.	Edit	Delete													
16.	Repeat the process to add additional goals as necessary.																
17.	Click the Submit button.	The page is redisplayed with a success message.															
18.	Click the Append Draft Goals link.	The Document Collaboration page is displayed.															

		
19.	Click the checkboxes next to any draft items you would like to include in this plan.	
20.	Click the Submit button. Navigate back to the IEP Annual Goal page.	The Annual Instructional Goals page is displayed with the draft items added to the table.
21.	Click the Edit link for a draft item you added.	The Goal information page is displayed.
22.	Modify the information as necessary.	<p>This is exactly the same as when you create new Goals as described above.</p> <p>Note that you may need to add objectives as they're not required for Draft Goals but are required for Goals in a plan.</p>
23.	Click the Submit and Display Goal List button	The Annual Instructional Goals page is displayed.
24.	Repeat for all of the draft items you added.	

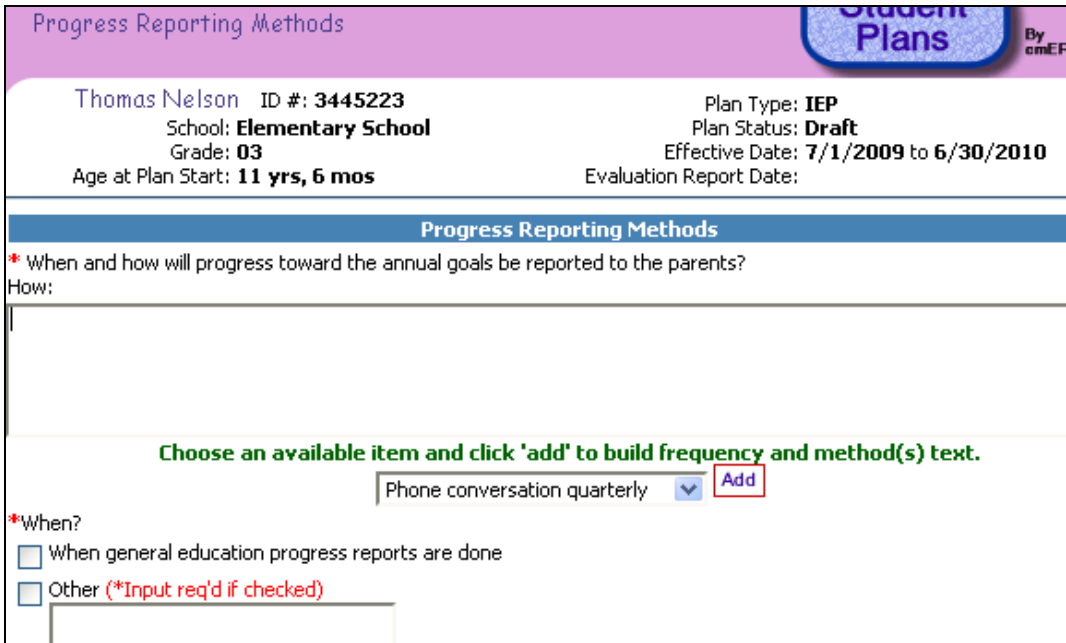



Progress Reporting Methods

***DUE PROCESS NOTE:**

Remember to use the drop down option for the statement. The statement includes the required components. If you COPIED the IEP, please pay special attention to this area. It may have been written incorrectly on the previous document!

**** A Summary of Performance document cannot take the place of a progress report.**

1.	On the Menu Bar, click Progress Reporting Methods.	The Progress Reporting Methods page is displayed.
		
2.	Click on the drop-down menu and choose a reporting method.	These are customized for your district.
3.	Click the Add button. 	The reporting method text is added to the description in the text box above.

4.	Click in the text box and edit the information as necessary.	<p>This is required information that must be filled in before the plan can be finalized.</p> <p>If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the plan.</p>
5.	Click the Submit button.	The page is redisplayed with a success message.

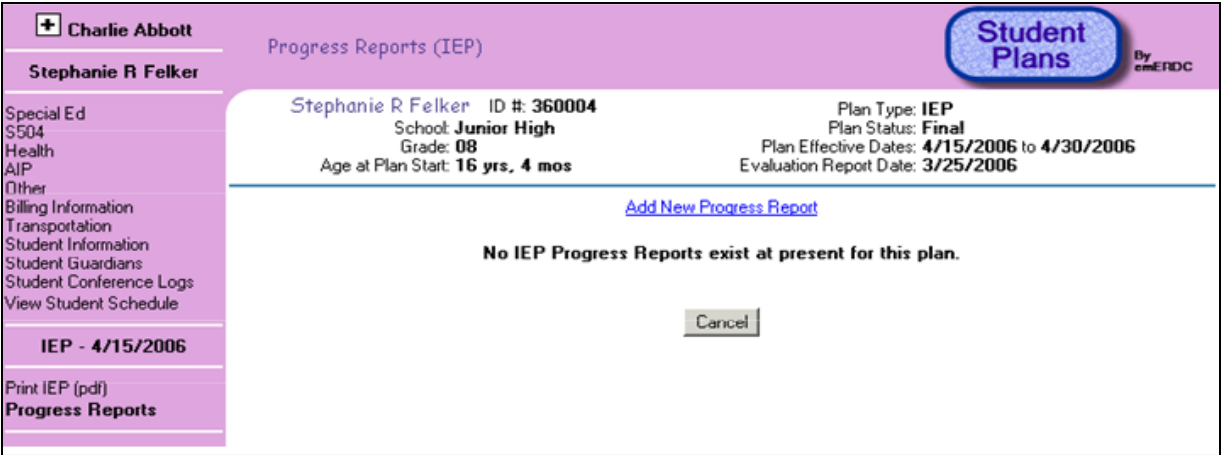


IEP Followup (Progress Reports)

Once a plan has been finalized, you can add progress reports to it. Progress Reports are available only on Education Plans that are Final. Goals and objectives (if district option is set) are pulled in from the Annual Goals section of the IEP.

***DUE PROCESS NOTE:**

You must specifically identify the individual objectives and DATA per objective when sharing progress. If your objective indicates 80% accuracy on 8 of 10 observations, you need to share what that data looks like. For instance, "Student earned the following scores during quarter one 81%, 79% and 89%. Currently the student has successfully completed 2 of 10 observations."

1.	In the document group table showing the plan with a Final status, click the followup link.	The Progress Reports page is displayed with the most recent report on top and the older ones below.
		
2.	Click the Add New Progress Report link.	The Progress Report Definition page is displayed.

+ Charlie Abbott Progress Report Definition **Student Plans** By cmERDC

Stephanie R Felker

Special Ed
S504
Health
AIP
Other
Billing Information
Transportation
Student Information
Student Guardians
Student Conference Logs
View Student Schedule

IEP - 4/15/2006

Print IEP (pdf)
Progress Reports

Stephanie R Felker ID #: 360004
School: Junior High
Grade: 08
Age at Plan Start: 16 yrs, 4 mos

Plan Type: IEP
Plan Status: Final
Plan Effective Dates: 4/15/2006 to 4/30/2006
Evaluation Report Date: 3/25/2006

*Report Date: 4/14/2006

*Status: Draft

Submit Reset Cancel

*Required Fields

3. Enter the appropriate information in the Report Date and Status boxes.

4. Click the Submit button.

The Progress Report page is displayed.

+ Charlie Abbott Progress Report Report Date: 4/14/2006 **Student Plans** By cmERDC

Stephanie R Felker

Special Ed
S504
Health
AIP
Other
Billing Information
Transportation
Student Information
Student Guardians
Student Conference Logs
View Student Schedule

IEP - 4/15/2006

Print IEP (pdf)
Progress Reports

Progress Report 4/14/2006

Goals Progress
Check Completeness
Print Progress (pdf)

Progress Report for Stephanie R Felker was successfully created.
You may now enter the progress information for each goal.

Stephanie R Felker ID #: 360004
School: Junior High
Grade: 08
Age at Plan Start: 16 yrs, 4 mos

Plan Type: IEP
Plan Status: Final
Plan Effective Dates: 4/15/2006 to 4/30/2006
Evaluation Report Date: 3/25/2006

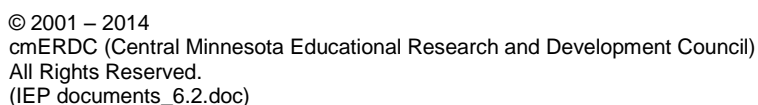
Goal #1	Skill to Change	a bunch of standard template text goes in here.
	Progress	Add
	Comments	
Goal #2	Skill to Change	a bunch of standard template text goes in here.
	Progress	Add
	Comments	
Goal #3	Skill to Change	Concepts - Money Value. Stephanie will increase money skills from limited understanding of coins/bills and their values to being able to identify coins/bills, values and count money.
	Progress	Add
	Comments	
Goal #4	Skill to Change	Citizen Rights/Responsibilities. Stephanie will increase awareness of citizen rights and responsibilities so that he/she can state her rights and responsibilities in a variety of situations.
	Progress	Add
	Comments	

Cancel

5. On the Progress line for Goal #1, click the Add link.

The Goal Progress page is displayed.

6.	Click in the radio buttons and text box and fill in or change all of the required information.	<p>The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already.</p> <p>If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the document.</p>
7.	Click the Submit button.	The Progress Report page is displayed with a success message.
8.	Repeat for each of the Goals in the plan.	You must report something for each goal to finalize the report.



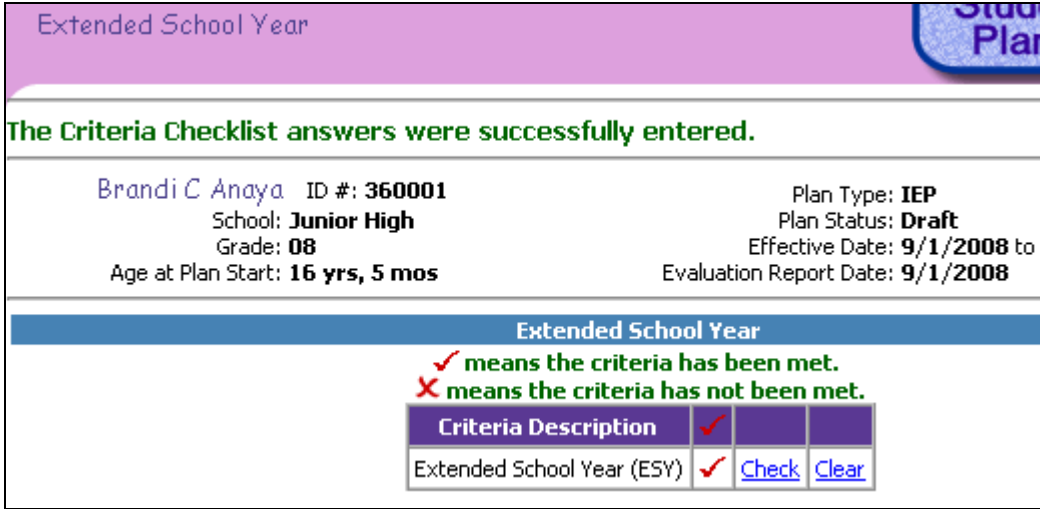
Extended School Year

***DUE PROCESS NOTE:**

When considering ESY, remember it is about maintaining skills – not about growing them. You will need to identify the specific goals and objectives to be covered. Also, consider the amount of time appropriate to maintain skills. ESY can look like direct service at the school, could be packets of skills activities shared with families or phone consultation for skills maintenance.

1.	On the Menu Bar, click Extended School Year.	The Extended School Year page is displayed. The options for the question are set in district options.
2.	Click in the radio buttons to mark whether extended school year services are required for this IEP.	This question will only display if the district option: ESY Criteria required? is set to N
3.	Click the Submit button.	The page is redisplayed with a success message.
4.	On the Extended School Year (ESY) line of the table, click the Check link.	The Plan Criteria Checklist for Extended School Year (ESY) page is displayed.
5.	NOTE: If the plan is finalized with the More Data Needed selected there will be a tickler item reminder the case manager when the Extended Services need to be addressed. The plan needs to be put into correct mode and then remove the More Data Needed date and select either Y or N as appropriate.	

	<div data-bbox="266 205 1414 1020"> <div> Plan Criteria Checklist For Extended School Year (ESY) <div> Student Plans By cmERDC </div> </div> <div> <div> Brandi C Anaya ID #: 360001 School: Junior High Grade: 08 Age at Plan Start: 16 yrs, 5 mos </div> <div> Plan Type: IEP Plan Status: Draft Effective Date: 9/1/2008 to 9/1/2009 Evaluation Report Date: 9/1/2008 </div> </div> <div> <div>*Reviewer: Maureen Davis</div> <div>*Review Date: 8/24/2008</div> </div> <div> The team shall consider the following three areas to determine the student's need for Extended School Year services: Regression and Recoupment, Self Sufficiency, and the Pupil's Unique Need. To qualify, the student must meet the criteria in A, B or C, AND the criteria in D and E. </div> <div> ✓ means the criteria group has been met. ✗ means the criteria group has not been met. "Y" button means "Yes"; "N" button means "No"; "X" button means "Clear previous answer" </div> <div> <div>A. Regression and Recoupment</div> <div> Did this student experience a significant regression of a skill or acquired knowledge specified in the IEP goal(s) that required more than the length of the break to recoup? To qualify, answer Yes to A1 or A2. </div> <div> Y <input type="radio"/> N <input type="radio"/> X <input type="radio"/> </div> <div> 1. Use observations of pupil's tendency to regress over extended breaks of instruction during the school year. Indicate fall, winter or spring break. Use primarily if a student is new to the district or with an initial IEP with no previous progress notes. </div> <div></div> </div> </div>
6.	<div data-bbox="186 1054 790 1125">Click in the radio buttons and text boxes to mark the items as appropriate for this plan.</div> <div data-bbox="881 1054 1430 1125">The onscreen instructions describe the qualification requirements.</div>
7.	<div data-bbox="186 1161 524 1190">Click the Submit button.</div> <div data-bbox="881 1161 1485 1528"> The extended School Year page is displayed. <p>If the criteria checklist has been completed and the student qualifies, a check mark is displayed in the table.</p> <p>✓</p> <p>If the qualification criteria have not been met, an X is displayed.</p> <p>✗</p> </div>

		
8.	Click the Clear Link.	The Plan Criteria Checklist is displayed with a confirmation message.
9.	Click the Cancel button.	<p>The Extended School Year page is displayed.</p> <p>Confirming will delete all of your responses on the Plan Criteria Checklist. If you really do want to clear it, click the Confirm Clear button.</p>
10.	Define Goals for this student.	<p>See the Annual Goals section of this manual for more information.</p> <ul style="list-style-type: none"> • If no goals have been defined, “No goal records exist at present” will be displayed as shown above. • As you add goals to the IEP, they will appear on the ESY form as shown below.

Extended School Year

Student Plans

By cmERDC

Brandi C Anaya ID #: 360001

Plan Type: IEP

School: Junior High

Plan Status: Draft

Grade: 08

Effective Date: 9/1/2008 to 9/1/2009

Age at Plan Start: 16 yrs, 5 mos

Evaluation Report Date: 9/1/2008

Extended School Year

✓ means the criteria has been met.

✗ means the criteria has not been met.

Criteria Description	✓		
Extended School Year (ESY)	✓	Check	Clear

Check the Goals in which regression and lack of recoupment is noted or anticipated.
Check the Goals in which the learner's progress toward self sufficiency is affected.

#	Goal Area	Goal	Regr/Recp	Self Suff
1	Transition, including Vocational	Transportation Systems. Brandi will improve the skills of using various transportation systems so that she can be independent.	<input type="checkbox"/>	<input type="checkbox"/>

11. Click in the Regr/Recp (Regression/Recoupment) and the Self Suff (Self Sufficiency) checkboxes as appropriate.

If Regression/Recoupment or Self Sufficiency is flagged, added text appears on the goal pages of the printed plan as shown below.

12. Click the Submit button. Click print PDF and ESY services are indicated in the goal area.

The page is redisplayed with a success message.

Annual Instructional Goals

Goal #1

Area: Academic Performance

☒ Extended School Year services required. Regression and lack of recoupment may be anticipated in this area.

Present Level(s) of Educational Performance: including for K-12 students, describe how the disability affects their involvement and progress in the general curriculum (i.e., the same curriculum as for non-disabled students). For preschool children, describe how the disability affects the child's participation in appropriate activities.

PLEP

Goal:
 Pre Academic Math. Morgan will increase her pre-math skills from identifying a few math concepts and numbers to identifying basic developmental math concepts and numerals.

Short Term Objectives or Benchmarks
 Objective #1: When shown basic shapes, Morgan will identify them as circle, square, triangle, rectangle with 90% accuracy on 8 out of 10 trials.

 Objective #2: Morgan will identify and write number 0-10 when asked with 90% accuracy on 6 out of 10 trials.

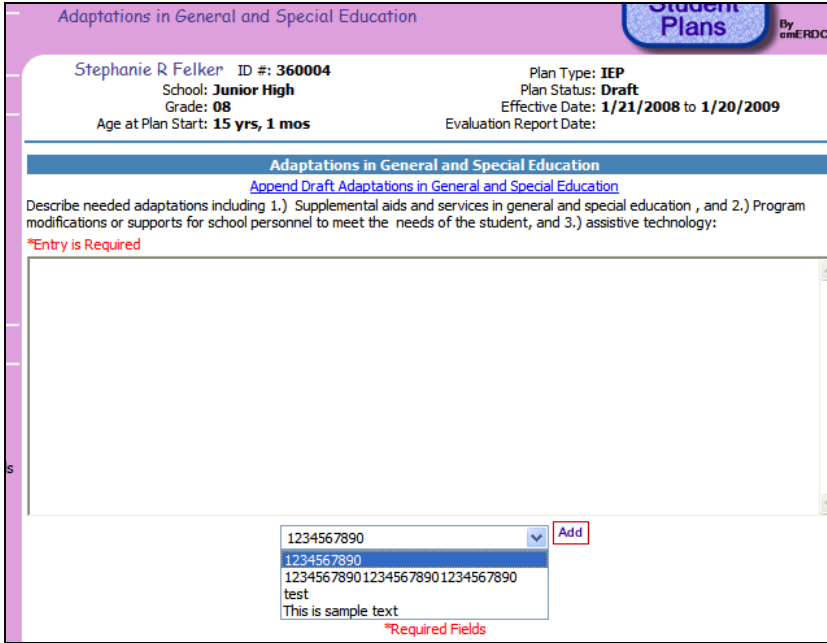



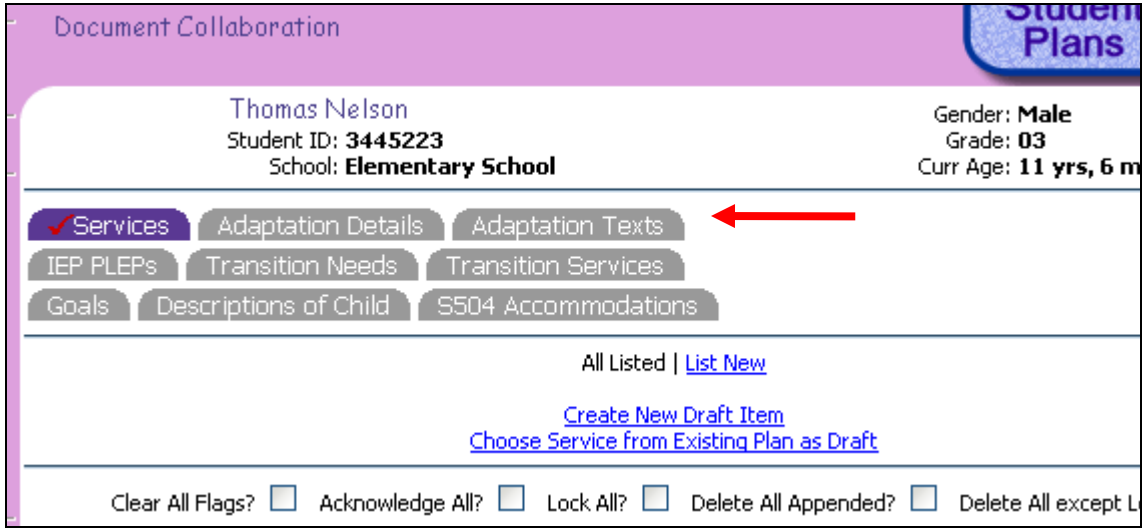
ADAPTATIONS

***DUE PROCESS NOTES:**

There are three text boxes – Supplemental, Modifications, Assistive Technology. Supplemental Adaptations includes services such as OT consultation, Para or PCA services, etc. When referencing para/pca services, please remember to be specific about some of their duties – including toileting, feeding, behaviors, etc. Modifications includes accommodations, behavior strategies, test taking requirements, alternate curriculum. Assistive Technology includes items such as software, augmentative communication devices or apps, calculators, manipulatives, sensory items, low tech graphic organizers, etc.

Adaptations – Using Text boxes

1.	On the Menu Bar, click Adaptations.	The Adaptations page is displayed.
		
2.	Click on the drop-down menu below the text box and choose an adaptation.	The accommodations displayed in the drop-down are customized for your district.
3.	Click the Add button. 	The adaptation text is added to the description in the text box above.
4.	Click in the box and edit the information as necessary.	
5.	Click the Submit button.	The page is redisplayed with a success message.

6.	Click the Append Draft Adaptations link.	The Append Draft Adaptations page is displayed.
		
14.	Click the checkboxes next to any draft items you would like to include in this plan.	The checkboxes will be available if there are draft items to append,
15.	Click the Submit button.	The Adaptations page is displayed with the draft item added.
16.	Modify the information as necessary.	This is exactly the same as when you create new Adaptations as described above.
17.	Click the Submit button.	The page is redisplayed with a success message.
18.	There are also adaptation supplemental, assistive and modifications pages if customized by system administrator	These screens behave the same way as described above.

Adaptations in General and Special Education (Supplemental)

Student Plans By cmERDC

Stephanie R Felker ID #: 360004
 School: Junior High
 Grade: 08
 Age at Plan Start: 15 yrs, 1 mos

Plan Type: IEP
 Plan Status: Draft
 Effective Date: 1/21/2008 to 1/20/2009
 Evaluation Report Date:

Adaptations in General and Special Education (Supplemental)
[Append Draft Adaptations in General and Special Education \(Supplemental\)](#)

*Describe needed supplemental aids and services in general and special education.
 *Entry is Required

Adaptations in General and Special Education (Modifications)

Student Plans By cmERDC

Stephanie R Felker ID #: 360004
 School: Junior High
 Grade: 08
 Age at Plan Start: 15 yrs, 1 mos

Plan Type: IEP
 Plan Status: Draft
 Effective Date: 1/21/2008 to 1/20/2009
 Evaluation Report Date:

Adaptations in General and Special Education (Modifications)
[Append Draft Adaptations in General and Special Education \(Modifications\)](#)

*Describe needed program modifications or supports for school personnel to meet the needs of the student.
 *Entry is Required

Adaptations in General and Special Education (Assistive Technology)

Student Plans By cmERDC

Stephanie R Felker ID #: 360004
 School: Junior High
 Grade: 08
 Age at Plan Start: 15 yrs, 1 mos

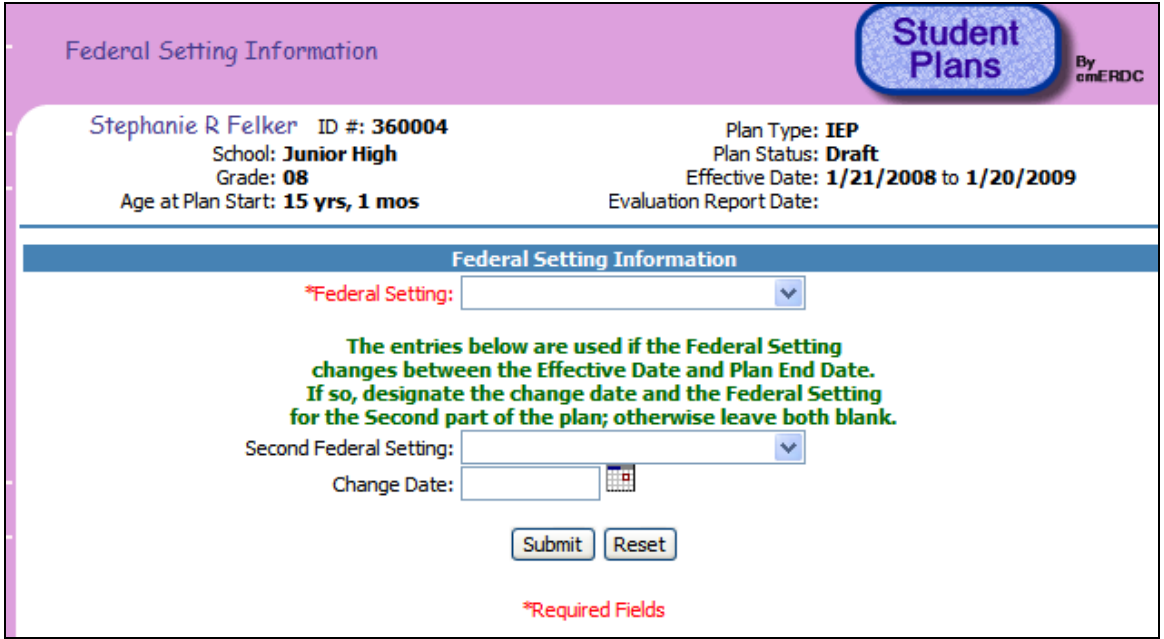
Plan Type: IEP
 Plan Status: Draft
 Effective Date: 1/21/2008 to 1/20/2009
 Evaluation Report Date:

Adaptations in General and Special Education (Assistive Technology)
[Append Draft Adaptations in General and Special Education \(Assistive Technology\)](#)

*Describe needed assistive technology.
 *Entry is Required



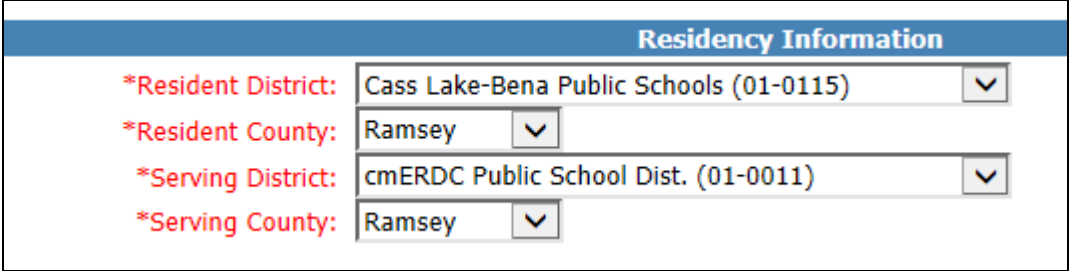
Federal Setting

1.	On the Menu Bar, click Federal Setting. The second federal setting will print on the IEP if it is turned on in document sections, else only the primary federal setting will print in the heading.	The Federal Setting Information page is displayed. NOTE: The second federal setting is used if there will be another setting during the interim of the IEP
		
2.	Click in the drop-down menus and text boxes and fill in or change all of the required information.	The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already.
3.	Click the Submit button.	The page is redisplayed with a success message.



Residency Information



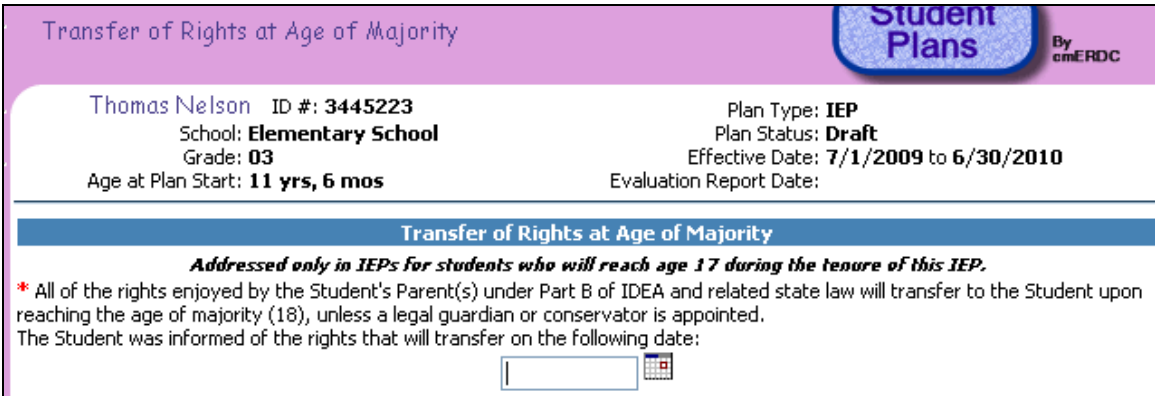
1.	On the Menu Bar, click Residency Information.	The Residency Information page is displayed.
		
2.	Click in the drop-down menus and fill in or change all of the required information. Use of enrollment status is determined by district	The items labeled with red text and an asterisk (*) are required information that must be filled in if they are not already.
3.	Click the Submit button.	The page is redisplayed with a success message.



Transfer of Rights

***DUE PROCESS NOTES:**

You must complete this section when the student turns 17 during the course of the current IEP.

1.	On the IEP Menu Bar, click Transfer of Rights.	The Transfer of Rights at Age of Majority page is displayed.
		
2.	Click in the box and enter a date.	<p>This is the date that the student was informed of the rights that will transfer to him/her upon reaching the age of majority (18), unless a legal guardian or conservator has been appointed.</p> <p>It is NOT the date that the student turns 18.</p>
3.	Click the Submit button.	The page is redisplayed with a success message.



Level of Performance (PLAAFP)

***DUE PROCESS NOTE:**

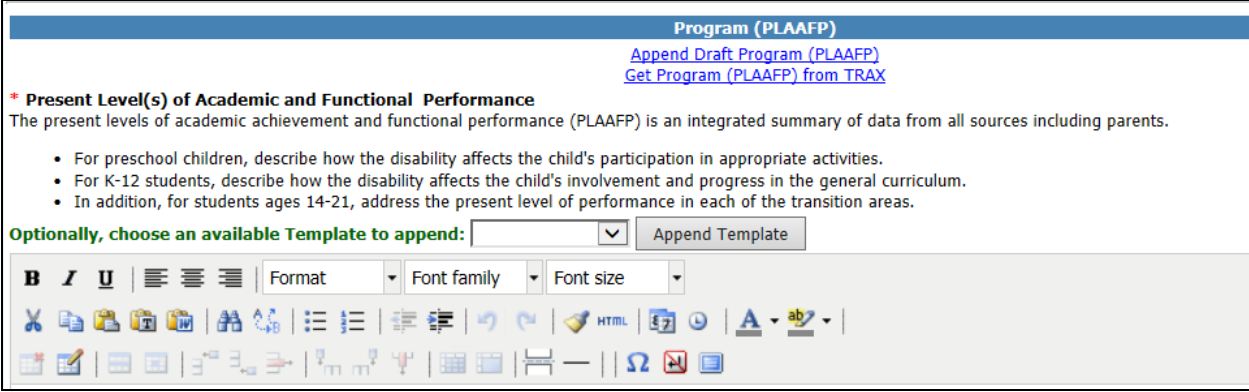
You must address the following items in this section: Describe how the disability affects the child's involvement and progress in the general curriculum. If transition age, you must address their present level of performance in the three areas as well.

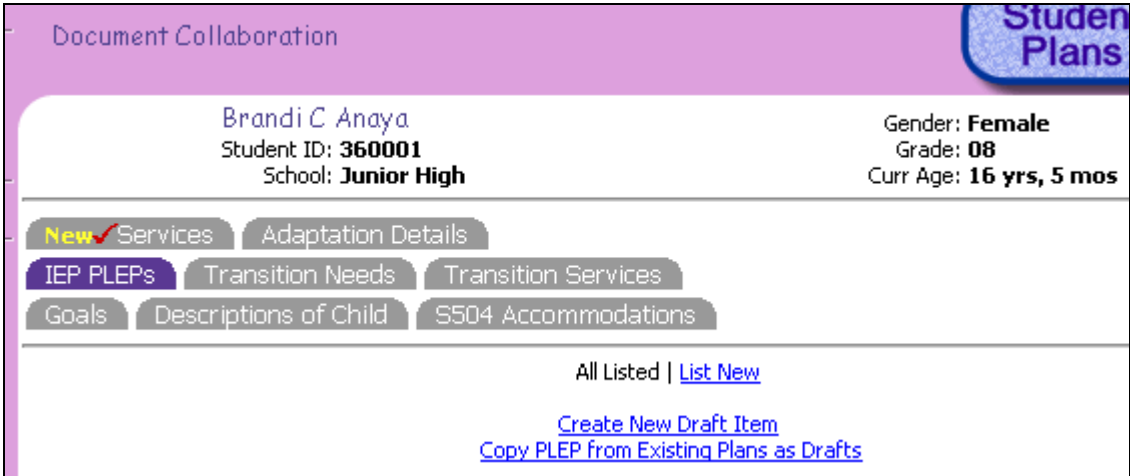
For example:

Johnny is eligible for services under the OHD category for Attention Deficit Disorder. He currently has needs related to organization, impulsivity control, as well as basic reading skills.

Johnny struggles in with maintaining his planner daily, putting his homework in his corresponding folders, turning in homework when requested, and with reading basic sight words with fluency. Currently, Johnny is missing 35 of 70 assignments from quarter 3. He is able to read 10 of the first 100 sight words consistently. Additional data includes...

This affects his ability to demonstrate knowledge and understanding of the curriculum, as well as his independence in the daily environment.

1.	On the IEP Menu Bar, click Level of Performance if available.	The Program (PLAAFP) page is displayed.
		
2.	Click on the Template to Append drop-down menu and select a template to use.	This is optional and may be done at any point in the process. If your district has a template set up, it's usually easiest to use that than to start from scratch.

3.	Click the Append Template button.	<p>The page is redisplayed with the template information added below whatever other information exists in the text box.</p> <p>Depending on how your templates are set up, you may wish to append several templates back-to-back.</p>
4.	Click in the text box and edit the information as necessary.	See the part of this manual on using the Text Editor for more information.
5.	Click the Submit button.	The page is redisplayed with a success message.
6.	Click the Append Draft PLAAFP link.	The Document Collaboration page is displayed.
		
7.	Click the checkboxes next to any draft items you'd like to include in this plan.	
8.	Click the Submit button. Navigate back to IEP PLAAFP page.	The Program (PLAAFP) page is displayed with the draft items added just as when a template is added as described above.
9.	Modify the information as necessary.	
10.	Click the Submit button	The page is redisplayed with a success message.



Post-Secondary Goals

***DUE PROCESS NOTES:**

When writing measurable goals, please consider the following examples:

Education/Training

- *Following graduation, I will receive training while working at the Pine hardware store.*
- *I will enroll in on-the-job training at Superior Industries.*

Employment

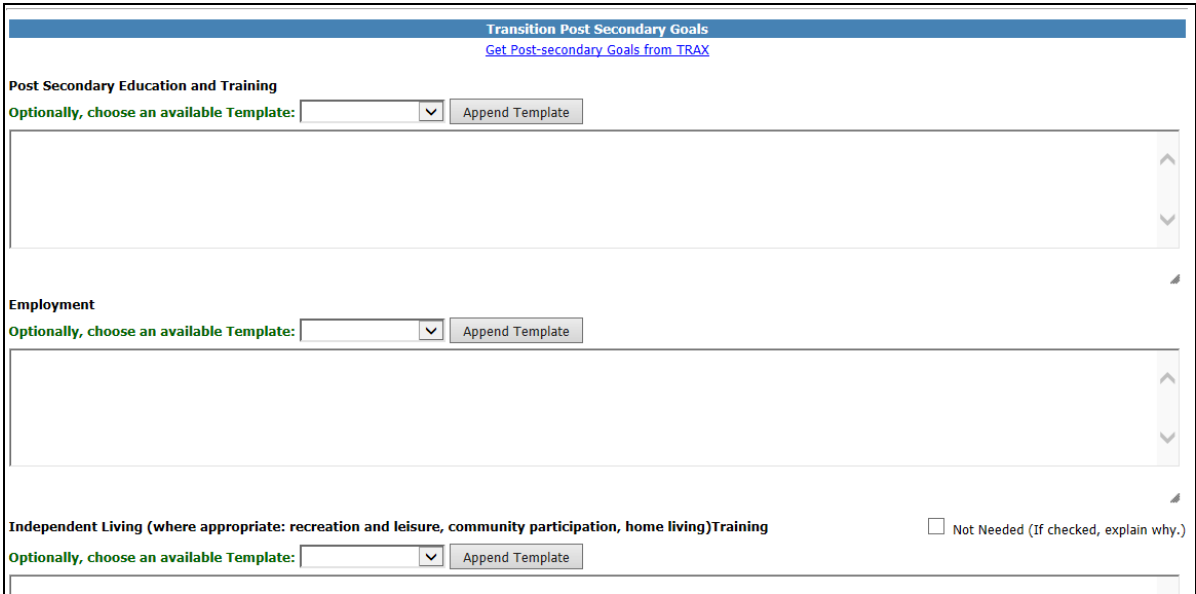
- *Following graduation, I will work full time at the Pine hardware store.*
- *Following graduation, I will work full time as a computer technician.*
- *I will continue working in jobs that involve animals.*

Independent Living

- *Following graduation, I will live in a group home with my friends.*
- *Following graduation, I will live in a dorm or an apartment.*

You must include the verbage, "I will..." in order to meet due process requirements.

1.	On the IEP Menu Bar, click Transition Goals	The Transition Post Secondary Goals page is displayed. (These goals are defined in Transition Activities table) NOTE: If the goals in the transition activity table are required, there will not be a box available to indicate that they are not needed. ** We do not use TRAX.
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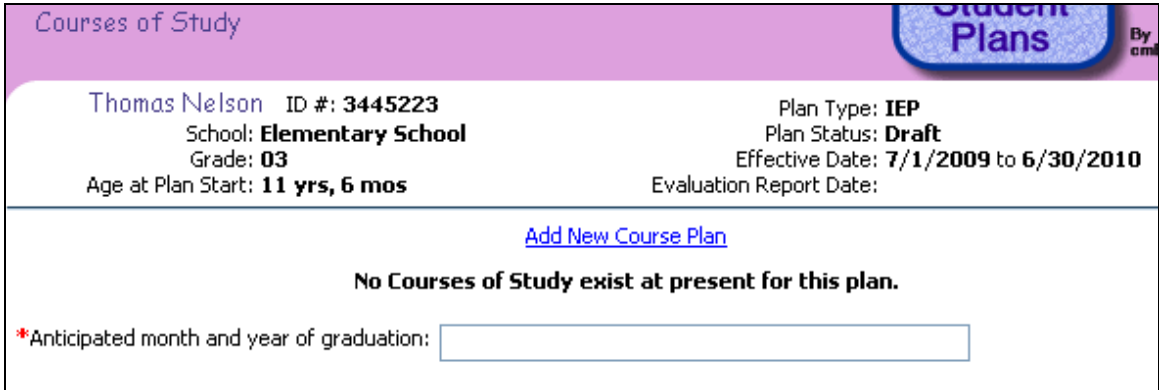
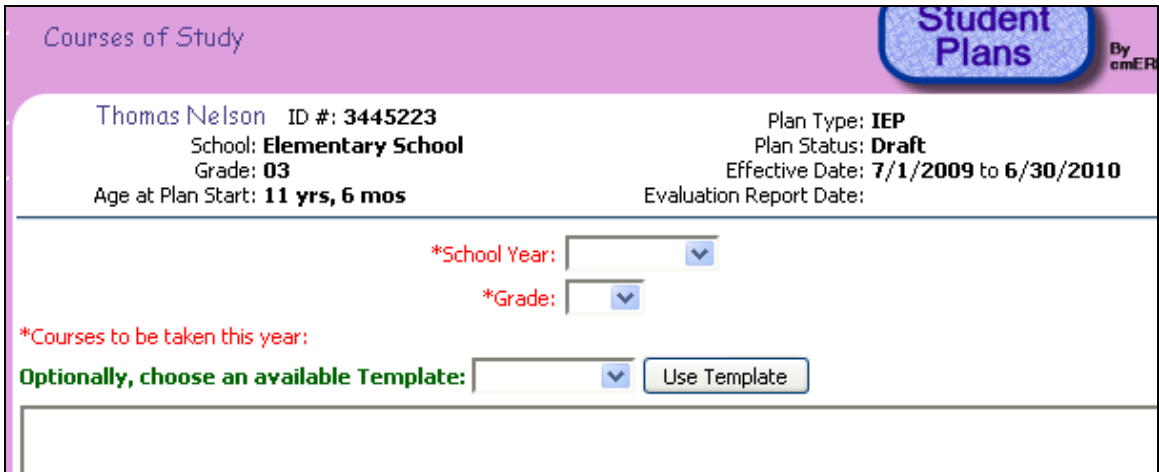
		
2.	Key in information about student's post secondary goals into the applicable area	If there is nothing to input for an area, click in the Not Needed box and explain why
3.	Optionally, click the down arrow next to append template if a template has been previously defined	
4.	Click the Submit button.	The page is redisplayed with a success message.
5.	NOTE: If the child is not of transition age as defined in district options, then they will pass completeness without filling anything in	



Course of Study

***DUE PROCESS NOTES:**

If the IEP will span two grade levels, consider the courses from BOTH years. Maintain the previous year's information on the IEP.

1.	On the IEP Menu Bar, click Course of Study	The Course of Study page is displayed.
		
2.	Key in anticipated month and year of graduation	
3.	Click the Submit button.	The page is redisplayed with a success message.
4.	Click on Add New Course Plan link	Key in information about courses of study that will be taken to fulfill post-secondary goals
		



Transition Service Needs

****DUE PROCESS NOTES:***

Consider the student's needs related to each section. Only include items the school or family is responsible for.

1.	On the IEP Menu Bar, click Transition Service Needs	The Transition Service Needs page is displayed. (These needs are defined in Transition Activities table) NOTE: If the service needs in the transition activity table are required, there will not be a box available to indicate that they are not needed.
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Statement of Transition Service Needs

Student Plans

By cmERDC

Joy A Boseck ID #: 10495
School: Elementary School
Grade: 03
Age at Plan Start: 8 yrs, 1 mos (6/29/2005)

Plan Type: IEP
Plan Status: Draft
Effective Date: 8/1/2013 to 8/15/2013
Evaluation Report Date:

[Get Statement of Transition Service Needs from TRAX](#)

Instruction (e.g. specialized or regular instruction, career and technical education)

Optionally, choose an available Template: Append Template ☐ Not Needed (If checked, explain why.)

Activity

Agency Providing Service

Related Services

Optionally, choose an available Template: Append Template ☐ Not Needed (If checked, explain why.)

Activity

Agency Providing Service

Community Participation

Optionally, choose an available Template: Append Template ☐ Not Needed (If checked, explain why.)

Activity

Agency Providing Service

The development of employment and other post-school adult living objectives

Optionally, choose an available Template: Append Template ☐ Not Needed (If checked, explain why.)

Activity

Agency Providing Service

If appropriate, acquisition of daily living skills & provision of a functional vocation evaluation

Optionally, choose an available Template: Append Template ☐ Not Needed (If checked, explain why.)

Activity

Agency Providing Service

2.	Key in information about student's transition service needs into the applicable area	If there is nothing to input for an area, click in the Not Needed box and explain why
3.	Optionally, click the down arrow next to append template if a template has been previously defined	If the Not Needed box is selected on either Transition Needs or Goals, it will be automatically selected on the corresponding page
4.	Click the Submit button.	The page is redisplayed with a success message.

