

## Initial Planning Meeting Summary

Student: \_\_\_\_\_ ID: \_\_\_\_\_ Referral Date: \_\_\_\_\_

Case Manager: \_\_\_\_\_ Teacher: \_\_\_\_\_

Date of Meeting: \_\_\_\_\_  First Planning Meeting  Second+ Planning Meeting

### **Procedures, tests, records, or reports provided:**

Previous CST/Medical Documentation:

- |   |   |
|---|---|
| <input type="checkbox"/> Psychological Evaluation       | <input type="checkbox"/> Social History                 |
| <input type="checkbox"/> Learning Evaluation            | <input type="checkbox"/> Speech/Language Evaluation     |
| <input type="checkbox"/> Medical Records                | <input type="checkbox"/> ESI-R Results                  |
| <input type="checkbox"/> Early Intervention Evaluations | <input type="checkbox"/> Audiological Evaluation        |
| <input type="checkbox"/> Psychiatric Evaluation         | <input type="checkbox"/> Adaptive Evaluation            |
| <input type="checkbox"/> Neurological Evaluation        | <input type="checkbox"/> Functional Behavior Assessment |
| <input type="checkbox"/> Other: _____                   |   |

Academic/District Documentation:

- |  |  |
|--|--|
| <input type="checkbox"/> <b>I&amp;RS Packet*</b> | <input type="checkbox"/> PIRT Packet             |
| <input type="checkbox"/> NJSLA-ELA Test Results  | <input type="checkbox"/> NJSLA-Math Test Results |
| <input type="checkbox"/> Report Card             | <input type="checkbox"/> Conduct Report          |
| <input type="checkbox"/> Attendance Report       | <input type="checkbox"/> Step Test Results       |
| <input type="checkbox"/> iReady Results          | <input type="checkbox"/> Work Samples            |
| <input type="checkbox"/> Other: _____            |  |

*\*Note: I&RS Interventions are required as per NJAC 6A 14-3.3(a)3(i): "The procedures shall include: i. Utilizing strategies identified through the Intervention and Referral Services program according to N.J.A.C. 6A:16-8, as well as other general education strategies."*

### **At this time, evaluations are:**

**Warranted.** If parent agrees, evaluations will be completed and an eligibility meeting will be held within 90 days of this meeting.

**Not warranted** due to:

- I&RS strategies were not provided to student; or I&RS strategies were not provided in accordance with the procedures outlined in the *Resource Manual for Intervention and Referral Services (I&RS)*, published by the NJ DOE.
- Interventions are not documented in accordance with NJAC 6A:14-3.3(c) and/or do not contain one or more of the following components: type of intervention; frequency and duration of each intervention; effectiveness of each intervention.
- Student has not had sufficient exposure to a structured learning environment (NJAC 6A:14 Appendix A, 20 USC 1414(b)5).
- Student absences have impacted the student's ability to appropriately access the curriculum (NJAC 6A:14 Appendix A, 20 USC 1414(b)5).
- Student is making measurable progress through interventions in the general education setting.
- Student is not displaying deficits to a degree that would suggest a disability is present.
- There is no adverse effect on the student's educational performance (NJAC 6A:14-3.5(c)).

### **Possible next steps:**

- |   |  |
|---|--|
| <input type="checkbox"/> Continued exposure to structured learning environment  | <input type="checkbox"/> Consideration of a 504 Plan       |
| <input type="checkbox"/> Continued interventions in a general education setting | <input type="checkbox"/> Referral to I&RS                  |
| <input type="checkbox"/> Referral to school guidance counselor or SBYS          | <input type="checkbox"/> Assistance from an outside agency |
| <input type="checkbox"/> Other: _____   |  |