

## Initial Planning Meeting

Student: \_\_\_\_\_ ID: \_\_\_\_\_ Referral Date: \_\_\_\_\_  
 Case Manager: \_\_\_\_\_ Teacher: \_\_\_\_\_

### Before the meeting:

✓	When:	Task:	Completed:
	Within 1 business day of receiving referral	Enter the student in IEP Direct.	
	Within 1 business day of receiving referral	Process track Receipt of Referral.	
	Within 1 business day of receiving referral	Upload all documentation regarding the student to the Document Repository (parent letter, referral packet, etc.)	
	Within 5 business days of receiving referral	Schedule the meeting.	
	Within 5 business days of receiving referral	Create and mail the invitation to the parent. Check the Meeting Participants tool for required participants; send the invitation via email to each of the required participants.	
	Within 5 business days of receiving referral	Contact the school nurse for a hearing/vision screening – Note this in Contact Log.	
	Within 10 days of receiving referral	Speak with the student's teacher – note this in Contact Log.	
	Within 15 days of receiving referral	Observe the student.	
	Within 15 days of receiving referral	Look at the student's current and previous report cards. Check grades and attendance patterns.	
	Within 15 days of receiving referral	Review all information with your team during a Weekly Calibration Meeting.	
	2 days before the mtg	Send an email reminder to the student's teacher.	

### At the meeting you should have:

✓	Item:
	Your charged laptop
	The referral letter or packet
	A copy of the student's current report card
	Notes from your observation of the student
	Hearing/vision screening

### During the meeting:

- If the parent does not attend, call the parent. Ask if he/she can participate by phone. Note this in Contact Log. If you cannot reach the parent, hold the meeting.
- Introductions: Allow each person present to introduce him/herself.
- State the purpose of the meeting.
- Start by asking the parent what his/her concerns are. Ask questions about the student's functioning/behavior at home.
- Ask the teacher to speak about the student's functioning at school. Review all prior interventions and their results.
- All participants should have the opportunity to ask questions and/or give information about the student.
- Take notes on your laptop about the information shared at the meeting.
- The team (CST, teacher, and parent) will come to a consensus about whether to evaluate the student.

In process tracking:

- Meeting or Agreement Result: Yes
- New Action: Initial Identification and Evaluation Planning
- Referred for: (Choose one)
- Determination: (Choose one)
- Action Date: Today's Date
- Include Prior Notice: Yes
- Click "ADD."
- In Prior Written Notice, fill in EACH SECTION using the notes you took on your laptop.
- If evaluations are warranted, in the Nature and Scope section at the bottom, click "Add." List each evaluation that will be completed.
- Click Save & Print

If parent is present, ask parent to give written consent for evaluations to begin.

In process tracking:

- Meeting or Agreement Result -> No
- Consent for Initial Evaluation Received or Refused
- Date: Today's date
- Click "ADD" then Save.

Print out the full IEP and give a copy of all paperwork, including the PRISE, to the parent.

If the parent is not present, send a copy of all meeting paperwork, including the PRISE, to the parent. Attempt to contact the parent to discuss the meeting. Note this in Contact Log.

If evaluations are warranted, wait 10 days for a parent response. If the parent does not respond, contact the parent. If the parent still does not respond, send the "Consent Refused" letter and log "Consent Refused" in process tracking.

Ask all participants to sign the Participation Page. If someone participated by phone, write in "Participated by Phone" next to their name. Do not allow anyone who did not participate to sign this page.

**If the student has previously been process tracked as *Evaluations Not Warranted*, email Kris immediately.**

**After the Meeting:**

✓	When:	Task:	Completed:
	Within 1 business day of the meeting	Upload the participation page to the student's document repository.	
	Within 1 business day of the meeting	Upload any additional documentation that you received at the meeting.	
	Within 3 business days of the meeting	Send all original documents to the file room.	
	Within 3 business days of the meeting	Follow up with the parent if he/she was not present.	
	Ongoing	If evaluations are warranted, discuss the status of the evaluation(s) at each Weekly Calibration Meeting.	