

## Initial Planning Meeting Checklist

Student: \_\_\_\_\_ ID: \_\_\_\_\_ Date of Meeting: \_\_\_\_\_

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

### Invitation Includes:

- Parent
- Gen Ed Teacher
- Psychologist
- LDTC
- Social Worker
- Related Service Providers (as appropriate)
- Student (when appropriate)

### Meeting notes include:

- Detailed information about why evaluations are or are not warranted

### If evaluations are warranted:

- Consent to evaluate is signed by parent
- Consent to evaluate lists evaluations that are warranted
- Evaluations are listed in "Nature and Scope of the Evaluation" in Frontline IEP process tracking
- Student has been submitted for Summer Assessment (Google Form)

### Frontline IEP Process Tracking:

- Meeting is logged in process tracking
- Consent to evaluate is logged in process tracking

### Document Repository:

- Meeting notes uploaded into document repository
- Participation pages uploaded to document repository
- Consent to evaluate uploaded to document repository (if appropriate)

### Additional:

- Parent was provided with PRISE