

Assess/Review/Revise Meeting

Student: _____ ID: _____ Referral Date: _____
 Case Manager: _____ Teacher: _____

Note: An assess/review/revise meeting is used to: add or change related services such as speech, OT, PT, behavior, nursing; add or change goals/objectives, modifications, or supplemental services; change placement; add or update state testing information; etc. The purpose of the meeting is to review all current information about the student, determine if additional assessments are required, and make appropriate revisions to the IEP.

Before the meeting:

✓	When:	Task:	Completed:
	Within 5 days of receiving a request for a meeting	Speak with the student's teacher regarding his progress in the classroom – note this in Contact Log.	
	Within 10 days of receiving a request for a meeting	Observe the student.	
	Within 10 days of receiving a request for a meeting	Upload any documentation regarding the student to the Document Repository (student observation, medical documents, etc).	
	At least 10 days before the meeting	Schedule the meeting.	
	At least 10 days before the meeting	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.	
	At least 1 week before the meeting	Check with the school nurse to see if the student has any medical concerns – Note this in Contact Log.	
	At least 1 week before the meeting	Look at the student's current and previous report cards. Check grades and attendance patterns.	
	At least 1 week before the meeting	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
	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 current 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, teachers, and parent) will come to a consensus about whether additional assessments are needed for this student. If additional assessments (such as OT, PT, Speech, etc.) are required:

In process tracking:

- Meeting or Agreement Result: No
- New Action: Consent for Additional Assessment Requested
- Action Date: Today's Date
- Click "ADD."
- In Comments, note which additional assessments are needed. Click "SAVE."
- Click "Schedule Tasks;" choose "Follow Up To Do Tasks."
- Click "ADD" and add each assessment that is needed. Click "Save & Return."

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

In process tracking:

- Meeting or Agreement Result - > No
- Consent for Additional Assessments Received or Refused
- Determination: (Choose one)
- Date: Today's date
- Click "ADD"

- 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, evaluations can begin after 15 days. Note that the 60-day timeline begins the day of the meeting. After evaluations are completed, hold another assess/review/revise meeting.

- Whether or not evaluations are warranted, the team (CST, teacher, and parent) will come to a consensus about whether changes need to be made to the IEP. If changes are needed, they should be made during the meeting. **All** start dates should be 15 days after today's date.

In process tracking:

- Meeting or Agreement Result - > Yes
- Assess Progress and Review or Revise IEP
- Date: Today's date
- Click "ADD"
- In the Meeting Information section, Comment area, write a brief summary of the meeting. Click "Save & Return."

Finalize the IEP

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

[Assess/Review/Revise Continued]

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. If student is eligible, wait 15 days for a parent response. If the parent does not respond, the IEP is implemented as written.

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.

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.	