[SUMMER] Initial Planning Meeting

Student: _____ ID: _____ Referral Date: _____

Case Manager: _____

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 3 business days of receiving referral	Schedule the meeting. Schedule the Initial Planning Meeting. Before scheduling, check the spreadsheet to be sure that the summer teachers are available.	
	Within 5 business days of receiving referral	Create and mail the invitation to the parent. Check the Meeting Participants tool for required participants; if needed, ask the summer teacher to help procure all participants.	
	Within 5 business days of receiving referral	Review all information available about the student including teacher interview, student observation, medical documentation, etc.	
	Within 5 days of receiving referral	Attempt to contact the student's previous teacher via email for more information.	
	Within 5 days of receiving referral	Look at the student's current and previous report cards. Check grades and attendance patterns.	

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.

☐ Review 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 all documents and give a copy of the meeting paperwork, including the **PRISE and NJ Code**, to the parent.

☐ If the parent is not present, send a copy of all meeting paperwork, including the **PRISE and NJ Code,** 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, after 15 days, 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.	