

**[SUMMER] Initial Eligibility Meeting**

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

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

**Before the meeting:**

✓	When:	Task:	Completed:
	14 days before meeting	Gather all completed CST evaluations.	
	14 days before meeting	Ensure that all evaluations are uploaded into the document repository and scores are entered in "Evaluations/Reports" and "Standardized Test Results".	
	12 days before meeting	Ensure that all evaluations have been mailed to parent. (Check with summer teacher, or contact parent.)	
	10 days before meeting	Review the results of the evaluations and compare the information to the Eligibility Checklist.	
	10 days before meeting	If the student is eligible, create an IEP for the student. The IEP should be completed IN FULL using the Initial IEP Checklist before the meeting. All start dates must be the first day of school in September.	
	10 days before meeting	Schedule the Initial Eligibility Meeting. Before scheduling, check the spreadsheet to be sure that the summer teachers are available.	
	10 days before meeting	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.	
	5 days before the meeting	Check with the Senior Program Manager about possible placements for the student.	

**At the meeting you should have:**

✓	Item:
	Your charged laptop
	A copy of each evaluation
	The Eligibility Checklist
	A copy of the draft IEP (if eligible)

**During the meeting:**

- If the parent does not attend, call the parent. Ask if he/she can participate by phone. If you cannot reach the parent, hold the meeting.
- Introductions: Allow each person present to introduce him/herself.
- State the purpose of the meeting.
- Review the results of the evaluations.
- Compare the results of the evaluations to the Eligibility Checklist and state the student's eligibility.
- If the student is eligible, discuss the least restrictive placement for the child. No child should go from general education to full-day self-contained.

In process tracking:

- Meeting or Agreement Result: Yes
- New Action: Initial Eligibility Determination with IEP (eligible) OR Initial eligibility determination (not eligible)
- Referred for: (Choose one)
- Determination: (Choose one)
- Action Date: Today's Date
- Click "ADD."
- If the student is not eligible, fill in EACH SECTION in Prior Written Notice.
- Click Save & Print

Review the completed IEP with the parent and teacher. Make any necessary changes or adjustments to the IEP on your laptop. All start dates should be the first day of school, even if the parent waives the 15 day consideration period.

**Finalize the IEP.** If the parent is present, ask the parent to provide written consent to implement the IEP.

In Process Tracking:

- Meeting or Agreement Result - > No
- Consent for Initial IEP Implementation 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. If student is eligible, 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.

**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 1 business day of the meeting	Send the original, finalized IEP and participation page to the Placement Specialist.	
	15 days after the meeting	Log either Initial IEP Implemented or Consent Refused.	