

[SUMMER] Assess/Review/Revise Meeting

Student: _____ ID: _____ Referral Date: _____

Case Manager: _____

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	Review the information provided with the meeting request, including the student observation, teacher interview, medical documentation, etc. If needed, attempt to contact the student's previous teacher via email for more information.	
	At least 10 days before the meeting	Schedule the Assess/Review/Revise Meeting. Before scheduling, check the spreadsheet to be sure that the summer teachers are available.	
	At least 10 days before the 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.	
	At least 1 week before the meeting	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
	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 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 the first day of school.

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.

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.

[Assess/Review/Revise Continued]

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.	