

IEP Team Meeting Checklist: Initial Referral

Purpose: Review Referral Information and Determine the Need for Assessments

Before the meeting:

- Receive Parent Referral**
 - Date stamp referral (designated school secretary)
 - File in Student Record/ cumulative file
- Schedule IEP Meeting on master IEP calendar**
 - Within 30 days of registration (date stamp)
- Submit a [Request Access to Student Information for TIENET](#) form to the registrar or designated secretary to input (“flag”) the student in the HCPSS Student Management System.** Information is transferred to *TIENET* within 2 hours after entered.
- Gather and summarize the following information prior to IEP meeting date for each area of concern and send home summary/documents you plan to present at least 5 business days prior to IEP meeting**
 - [School Referral form/ Referral for a Student Suspected of Having a Disability form](#) if the parent or person outside the school initiated the referral
 - [Parent Questionnaire form](#) – PK-K
 - [Parent Questionnaire form](#) – School Age
 - *Teacher Report* form from each teacher including Related Arts/Electives
 - [Elementary Student](#)
 - [Secondary Student](#)
 - Existing data (including State and local assessments)
 - Observations by teachers or related service providers
 - Classroom-based assessments
 - Work samples
 - File review
 - Attempted interventions and data reflecting the student’s response
 - Data and information from the school’s problem solving team
- Create New Meeting Process, ensuring to select both *IEP Team Meeting Notice* and *IEP Team Meeting Report***
- Complete *Notice of Individualized Education Program (IEP) Team Meeting*** (within *TIENET*, go to *Meeting Process*):
 - Parents receive the notice at least 10 days before meeting
 - Select purpose(s) from drop down menu: *Develop and approve IEP. Plan and review transition services for students 14 and older if the student is 14, or will be during the upcoming IEP year*
 - Invite student if age 14 or older within the IEP year
 - Ensure notice lists all required IEP team members, including not less than one regular education teacher of the student, if the student is or may be participating in the regular education environment
 - On the notice, do not include names of those invited by the parent (e.g. lawyers, advocates, etc.)

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- Mail both the *IEP Team Meeting Notice and Parent Input form***
 - *For students prior to Kindergarten, use the Information To Help Plan My Child's IEP form*
- Send *Teacher Report form***
 - *For students prior to Kindergarten, use the Information To Help Plan My Child's IEP form*
- Confirm attendance of Parent and General Education Teacher**
 - Document multiple attempts for parent to attend
 - *For students prior to Kindergarten who are not enrolled in a general education program, the early childhood special educator may also serve as the general educator*
- Confirm student attendance** (for student age 14 or older, if the student will be 14 during the upcoming IEP year)
 - If the student is unable to attend, obtain and document information on the student's preferences and interests
- Prepare information/forms/sections for the meeting**

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At the Meeting:

- Introduction of team members**
- Review and correct listing of IEP team participants on the *IEP Team Report* to reflect attendees**
- Confirm parent receipt of Parental Rights Booklet and record in IEP Team Report**
- State the purpose of meeting.**
 - The purpose of the meeting is to review the referral information and determine if there is a need to obtain additional data or if assessments are needed
- Complete the *IEP Team Meeting Report* documenting review and discussion of the following in the appropriate sections on the IEP Team Meeting Report:**
 - *School Referral* form/ *Referral for a Student Suspected of Having a Disability* form, if the parent or person outside the school initiated the referral
 - *Parent Questionnaire* form
 - *Teacher Report* form from each teacher including Related Arts/Electives
 - Existing data (including State and local assessments)
 - Observations by teachers or related service providers
 - Classroom-based assessments
 - *Classroom Observation* form if one has been completed
 - Work samples
 - File Review
 - Attempted interventions and data reflecting the student's response
 - Data and information from the school's problem solving team (e.g., Student Support Team, Instructional Intervention Team), if available
- Determine diagnostic question(s)**

YES	NO
<input type="checkbox"/> Recommend appropriate assessments	<input type="checkbox"/> Refer back to Problem Solving Team, if appropriate
<input type="checkbox"/> Obtain written parental consent for evaluation	
<input type="checkbox"/> Schedule IEP Meeting to review assessments within the timeline: <ul style="list-style-type: none"> • Reference your 60/90 timeline • See procedural safeguard for clarification 	

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After the meeting:

Review *IEP Team Meeting Report*

- For all areas of documented discussions/decisions, select the “Add to IEP” box
- Run spell check
- Finalize *IEP Team Meeting Report*

File all paper work

Provide the parent(s) copy of *IEP Team Meeting Report* no later than five business days after the meeting

Assessments recommended:

Yes	No
<input type="checkbox"/> Complete assessments, after written consent is received	<input type="checkbox"/> File documents student’s record (the IEP folder system does not apply)
	<input type="checkbox"/> Submit a <i>Request Access to Student Information for TIENET</i> (“de-flag”)
	<input type="checkbox"/> Request deactivation of student in <i>TIENET</i> through “Admin Support”- QRC deactivation