Records Specialist Manual

Matanuska-Susitna Borough School District

Student Support Services

Edition: August 2021

Position Duties Information and Tips:

1. Run/Review Portfolio or Caseload Reports and monitor compliance dates *(every other week, at a minimum)*
    - Look ahead: At times IEPs may come due before 3y Reevaluations. Encourage Teams to gain consent to evaluate early to align dates, and only hold 1 meeting.
    - Check for ECDD students turning 9. ECDD is no longer a viable eligibility category once a child turns 9.
    - Check for next fall ESER/IEP completion requirements:
        - **IEPs** due on or before **September 15th** of the next school year **must be completed** before the end of this school year.
        - **Reevaluations** due on or before **September 30th** of the next school year **must be completed** before the end of this school year.

2. Track Compliance dates for Transfer-Ins, Eligibility Determinations, and IEP meetings.
    - From other Districts: Meeting must be held within 10 day after the School Psychologist/Speech Pathologist signs off on the Transfer-In. Documents and a Checklist are attached to the email sent to the school Team from SSS.
    - Childfind Preschool: Information is included/attached to the email sent to the school Team from SSS.
    - Infant Learning Program: Checklist and other needed documents are attached to the email sent to the school Team from SSS.

3. Track paperwork from all Team meetings; submit to Student Support Services based on timelines:
    - Send paperwork to Student Support Services weekly, at a minimum.
    - Paperwork should be clipped/batched by student, and not document type (for example the ESER and the IEP from the same meeting; Transfer-In documents and Referral packet if Consent was signed at the meeting).
    - A Checklist should accompany documents

4. Gather/Review Special Education evaluation Referral packets, and send to SSS for processing. *These documents are **required** for a Records Technician to process a Referral packet (**Exceptions: Speech Only Exits and Additional Assessments to dismiss Related Services)***
    - Referral Form (Not required for **Exceptions**)
    - Consent to Evaluate
        - Must be signed by either the documented parent/guardian, a confirmed Foster Parent, or a Surrogate Parent appointed by the District.
        - **Case Workers from the Office of Children's Services cannot sign special education paperwork as a parent, including the Consent to Evaluate**
    - Written Notice
    - Classroom Observation Form (Not required for **Exceptions**)

5. Review all Special Ed documents in Synergy SE before Case Manager Finalizes:
Review in Print Preview, so all embedded areas are visible (such as Supervision lines in the Services page)
    - Case Manager completes documents in Synergy SE, and runs Validation to identify any errors or missing information
    - Case Manager turns in any original signature pages for Records Specialist to upload and send to Student Support Services
    - Records Specialist can type any handwritten notes into Synergy SE (many Case Managers prefer to type notes during the meeting; if handwritten, original notes are returned to Case Manager for their working file)
    - Check the Misc Documents tab in the student's Synergy SE record for any open documents. (Case Manager to Finalize, or have them deleted by the Records Technician)
    - Review documents; contact Case Manager with any needed edits or corrections
    - Alert Case Manager when documents are ready to be Finalized
    - Case Manager Finalizes documents; smaller documents first, IEP last

6. Stay informed of changes, updates, and information from Student Support Services. Information is typically distributed via:
    - Email, which often will include attachments.
    - Newsletter, which is typically sent out from the SSS Assistant Director on a quarterly basis.

7. Work with the school Registrar to track changes in student's information/status, and communicate changes to the Records Technician at Student Support Services:
    - Student enters Foster placement
    - Legal name changes
    - New student enrolls
    - Enrolled student withdraws/stops attending

8. Monitor for Progress Report completion:
    - Case Managers and Related Service Providers should report progress:
        - On Goal Objectives each quarter
        - On Goal Objectives prior to the new Annual Review
        - On Goal Objectives before exiting a student who is moving from the District
    - Using the Caseload and/or Portfolio List, check that progress is being entered into Synergy SE by the Case Managers/Related Service Providers.

9. Send any hard copy Quarterly Service Tracking sheets to Student Support:
    - Only Elementary Case Managers are required to track daily attendance and service provision related to their students.
    - *Secondary Case Managers and Related Service Providers are no longer required to complete the Service Tracking/Attendance forms.* (Secondary attendance is tracked in the Student Information System, and related services are tracked within SEAS/Medicaid).

Things to Remember:

1) Vision and Hearing Screening is a requirement for Referrals, unless the Referral fits one of the noted Exceptions in #4.
    - If the school nurse is not able to complete these screenings, or a student fails one or both screens, Case Manager **must** talk with the School Psychologist for further direction.
    - Speech Language Pathologist may make decisions alone, if student is Speech Only
2) It is the **Case Manager/Certified Professional's** responsibility to write any Written Notice; this is not a Records Specialist duty.
3) A Records Specialist will review IEP's documents for clerical errors and missing information. A Records Specialist does not change the case managers wording or add wording to these documents.

❖ **All requests for Special Education records are processed through Student Support Services**, including, but not limited to:

- Requesting records from another District for an incoming student
- Sending records to another District for a student who has moved
- Requests from outside Agencies for a student's special education records (OCS, Ptarmigan Pediatrics/Connections, etc.)
- Requests to an outside Agency for their records related to a student (Northern Hearing, Alyeska Therapy, etc.)

Resource Specialist

Certified Resource Specialists, work out of the Student Support Services Department at District Office. This is the person you ask all questions relating to, placement options/changes, program consultation, clarification of SPED legal issues, clarification of procedures, dispute resolution, etc. The Resource Specialist can answer questions about the paperwork or provide guidance concerning difficult situations. In cases where a child requires several services and/or an intensive placement, it is advisable to have a Resource Specialist at the meeting.

Records Technician

This person works at District Office in the Student Support Services Department. He/she is assigned to several schools and is there to make sure all the paperwork is completed correctly.

Student Support Services Records Specialist

This person is assigned to several schools. He/she is there to support the Case Manager and 504 Coordinator by reviewing paperwork for clerical errors, scheduling meetings, tracking compliance dates, He/she may also help with setting up IEP meetings, organizing DRAFT IEP's. Not all schools are assigned a Records Specialist.

SYNERGY SIS and SYNERGY SE:

SIS: Student Information System

- Enrollment/Registration Information

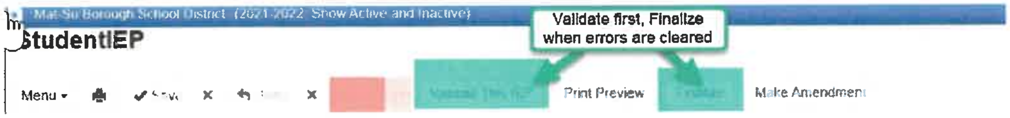
SE: Special Education component

- Special Education Documents and Plans
- 504 Accommodation Plans and Documents

SE TERMS AND DEFINITIONS:

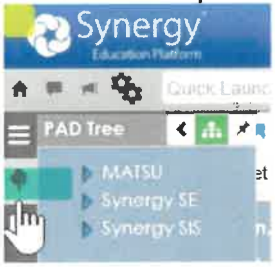
Validate: scan of a document once it is completed to check for errors

Finalize: locks the document; saves to Historical Documents as a PDF


Mat-Su Borough School District (2021-2022 Show Active and Inactive)
StudentIEP
Menu
Print Preview
Make Amendment

Validate first, Finalize when errors are cleared

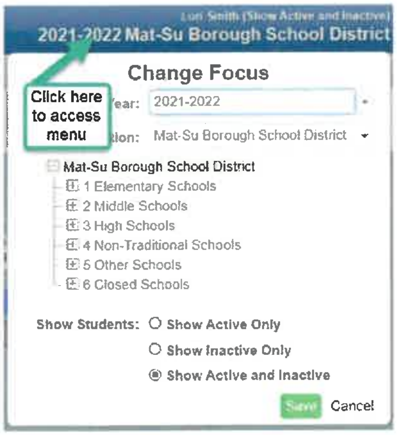
PAD Tree: menu listing of available items/screens within Synergy; content area headers expand to show screen options available under each. On the upper left of the screen:


Synergy
Education Platform
Quick Launc
PAD Tree
MATSU
Synergy SE
Synergy SIS

System Focus: how broad or narrow the list of schools/students you can see is based on HR assigned job code/role, and as configured by IT.

- School(s) Specific vs. District-Wide
- School Year
- Student Status: Active or Inactive

Located in the upper right of the screen:


Lori Smith (Show Active and Inactive)
2021-2022 Mat-Su Borough School District
Change Focus
Save
Cancel

Click here to access menu

Year: 2021-2022

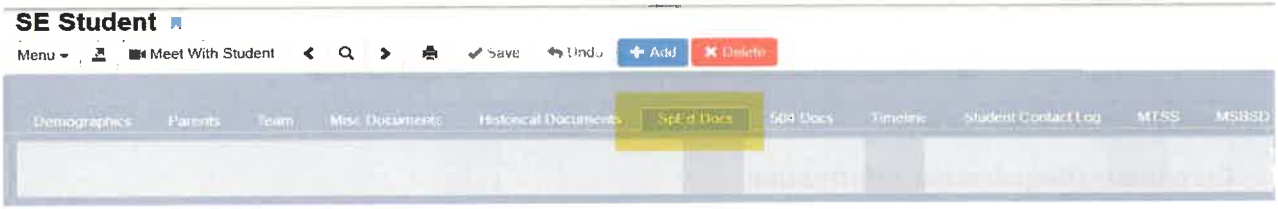
ion: Mat-Su Borough School District

Mat-Su Borough School District
- 1 Elementary Schools
- 2 Middle Schools
- 3 High Schools
- 4 Non-Traditional Schools
- 5 Other Schools
- 6 Closed Schools

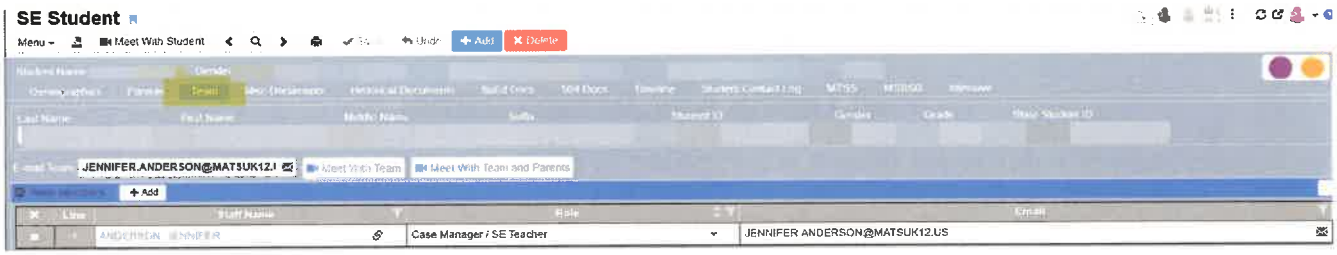
Show Students: ○ Show Active Only
○ Show Inactive Only
● Show Active and Inactive

8/5/21

SpEd Docs: The Special Education tab/section:


SE Student
Menu
Meet With Student
Save
Undo
Add
Delete
Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
MTSS
MSBSD

Team: Staff and Providers involved with/assigned to a student, found in the Team tab:


SE Student
Menu
Meet With Student
Add
Delete
Team
Meet With Team
Meet With Team and Parents
Add
Line
Staff Name
Role
Email

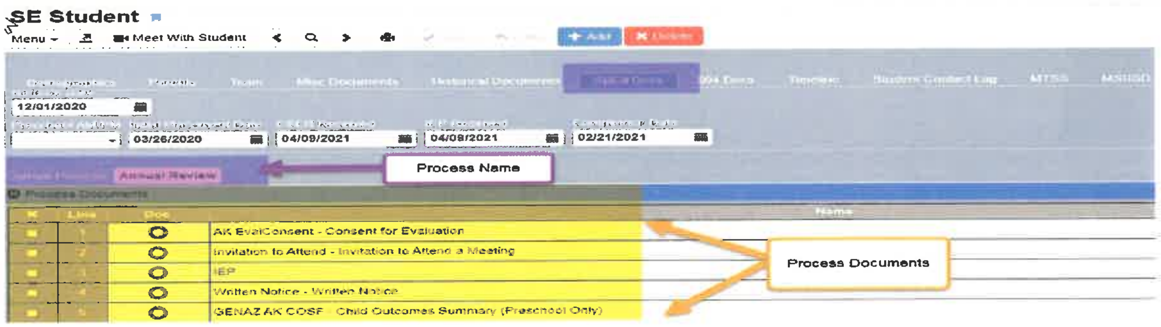
JENNIFER.ANDERSON@MATSUK12.I

Staff Name	Role	Email
ANDERSON, JENNIFER	Case Manager / SE Teacher	JENNIFER.ANDERSON@MATSUK12.US

Current Process: What "status" a student is in, found in the Sped Docs tab:

- Initial Evaluation
- Re-Evaluation (also used for Additional Assessment)
- Transfer In
- Annual Review
- Exit

Process Documents: those most associated/used with the process the student is in:


SE Student
Menu
Meet With Student
Add
Delete
Process Name
Process Documents

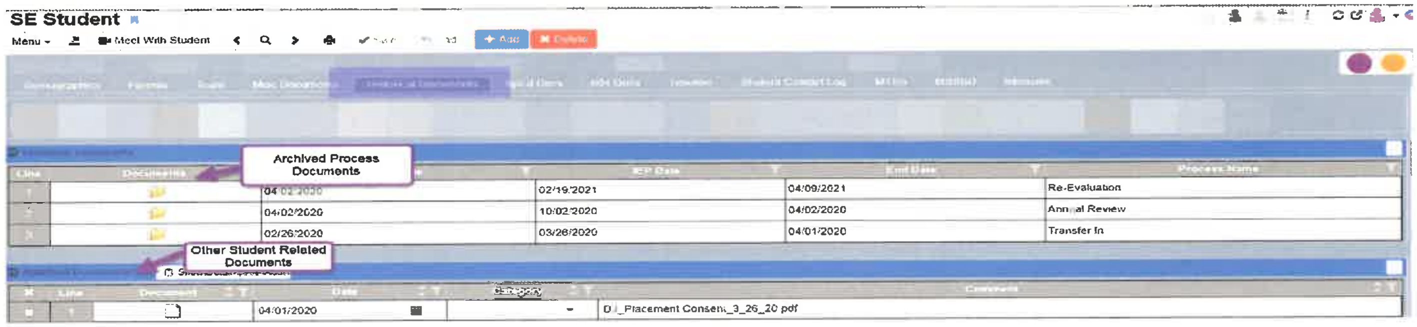
12/01/2020

03/26/2020 | 04/09/2021 | 04/08/2021 | 02/21/2021

Annual Review

- AK EvalConsent - Consent for Evaluation
- Invitation to Attend - Invitation to Attend a Meeting
- IEP
- Written Notice - Written Notice
- GENAZ AK COSF - Child Outcomes Summary (Preschool Only)

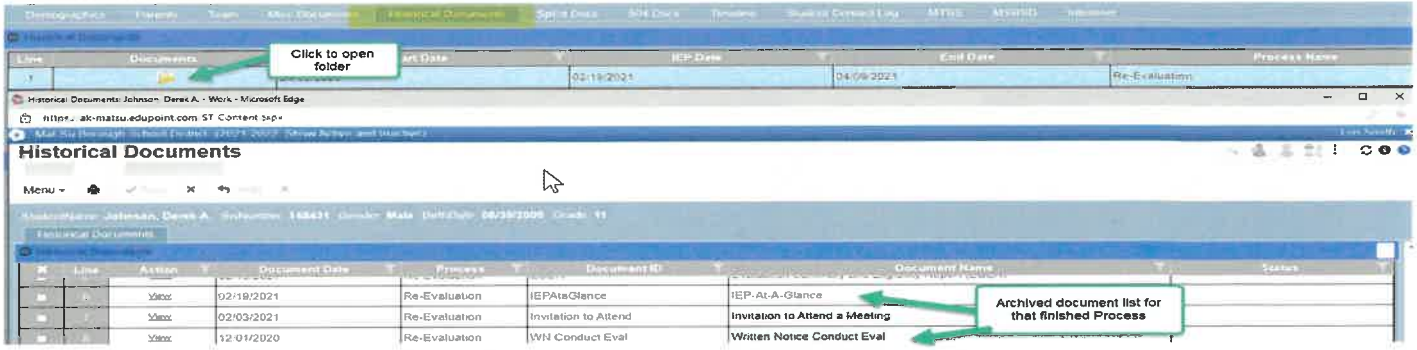
Historical Documents: the auto-archived as PDF after being Finalized, as well as other documents received and uploaded:


SE Student
Menu
Meet With Student
Add
Delete
Archived Process Documents
Other Student Related Documents

	IEP Date	End Date	Process Name
04/02/2020	02/19/2021	04/09/2021	Re-Evaluation
04/02/2020	10/02/2020	04/02/2020	Annual Review
02/26/2020	03/28/2020	04/01/2020	Transfer In

Date	Comments
04/01/2020	D_Placement Consent_3_26_20 pdf

IEP-At-A-Glance: the truncated version of the IEP that General Education teachers will see within TeacherVUE on the SIS side of Synergy. Will be part of the document list within the yellow Historical Documents folders:


Click to open folder

IEP Date	End Date	Process Name
02/19/2021	04/09/2021	Re-Evaluation

Historical Documents: Johnson, Derek A. - Work - Microsoft Edge

https://ak-matsu.edupoint.com/ST Content.aspx

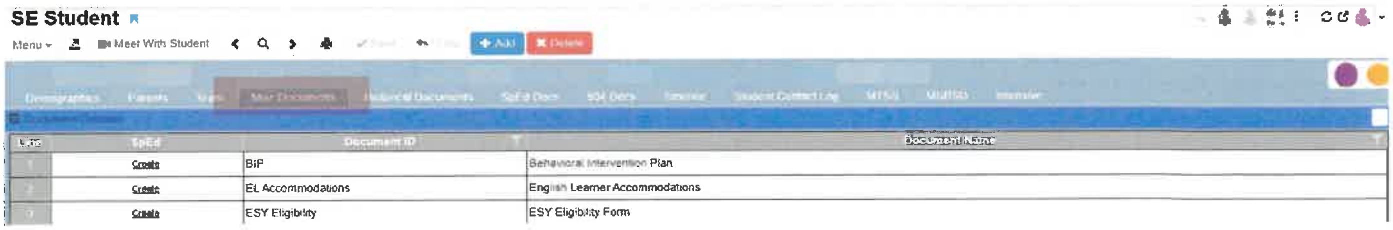
Historical Documents

Action	Document Date	Process	Document ID	Document Name	Status
View	02/19/2021	Re-Evaluation	IEPAtaGlance	IEP-At-A-Glance	
View	02/03/2021	Re-Evaluation	Invitation to Attend	Invitation to Attend a Meeting	
View	12/01/2020	Re-Evaluation	WN Conduct Eval	Written Notice Conduct Eval	

Archived document list for that finished Process

Miscellaneous Documents: Other documents a team may need, for example:

- Extended School Year Eligibility
- Behavior Intervention Plan
- Medicaid Form


SE Student

Line	SpEd	Document ID	Document Name
1	Create	BIP	Behavioral Intervention Plan
2	Create	EL Accommodations	English Learner Accommodations
3	Create	ESY Eligibility	ESY Eligibility Form

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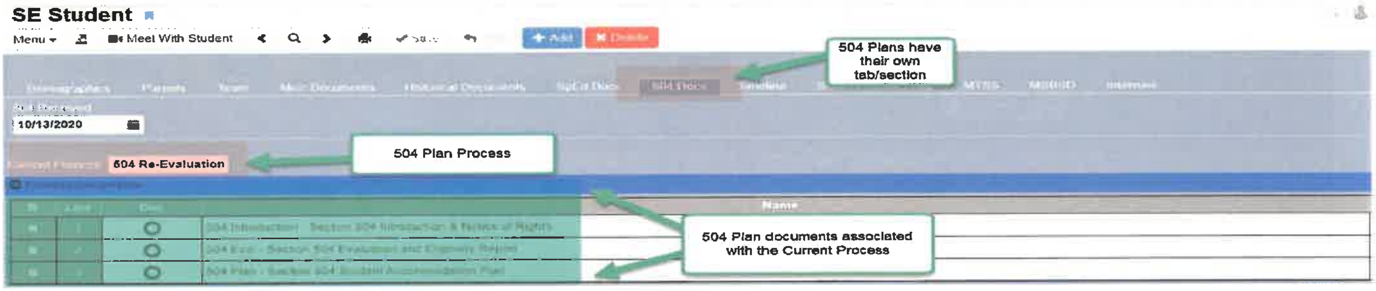
504 Accommodation Plans


SE Student
Menu
Meet With Student
Add
Delete
504 Re-Evaluation
Name

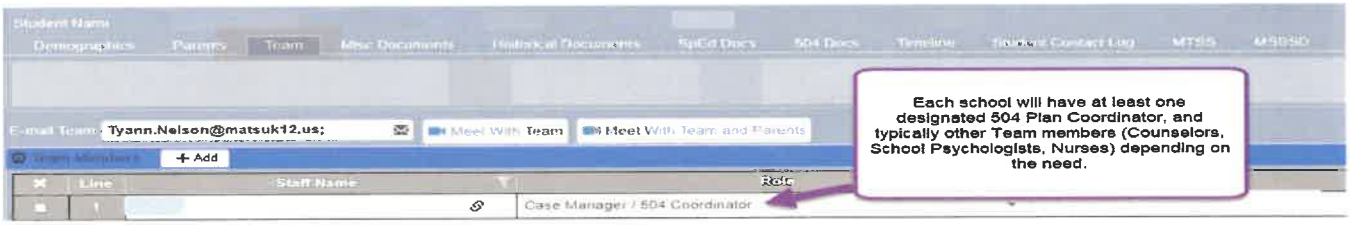
10/13/2020

504 Plans have their own tab/section

504 Plan Process

504 Plan documents associated with the Current Process

Team: School site staff responsible for completing and implementing the 504 Accommodation Plan:

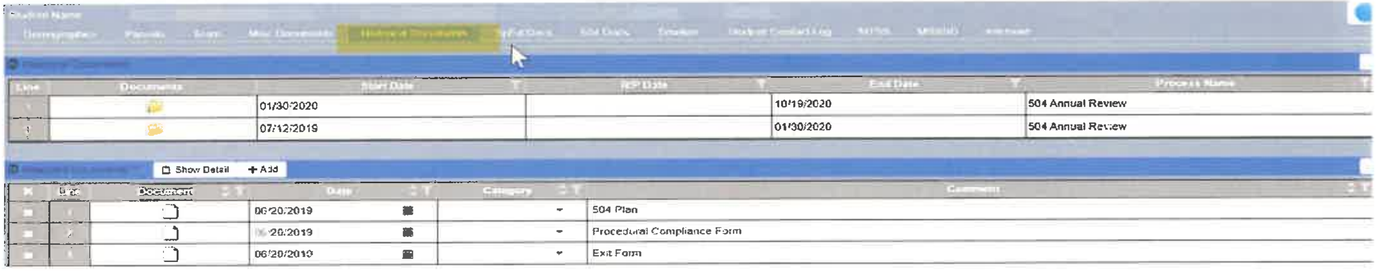

Student Name
Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
MTSS
MSBSD
Meet With Team
Meet With Team and Parents
+ Add
Line
Staff Name
Role

E-mail Team: Tyann.Nelson@matsuk12.us;

Case Manager / 504 Coordinator

Each school will have at least one designated 504 Plan Coordinator, and typically other Team members (Counselors, School Psychologists, Nurses) depending on the need.

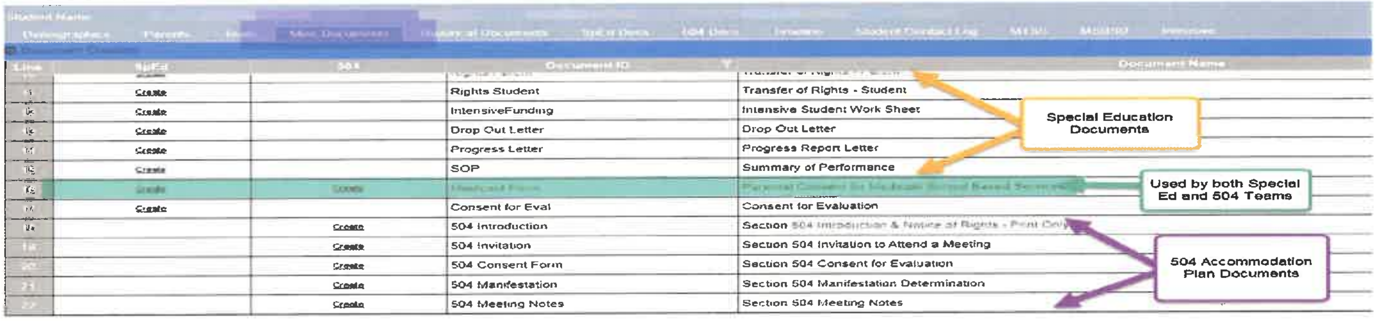
Historical Documents: 504 Plans have their own sets of Historical Documents and uploaded Attached Documents:


Historical Documents
Show Detail
+ Add

Documents	Start Date	IEP Date	End Date	Process Name
	01/30/2020		10/19/2020	504 Annual Review
	07/12/2019		01/30/2020	504 Annual Review

Document	Date	Category	Comment
	06/20/2019		504 Plan
	06/20/2019		Procedural Compliance Form
	06/20/2019		Exit Form

Miscellaneous Documents: 504 Plans have their own set of Misc Documents:


Misc Documents

SpEd	504	Document ID	Document Name
Create		Rights Student	Transfer of Rights - Student
Create		IntensiveFunding	Intensive Student Work Sheet
Create		Drop Out Letter	Drop Out Letter
Create		Progress Letter	Progress Report Letter
Create		SOP	Summary of Performance
Create	Create	Medicaid Form	Parental Consent for Medicaid School Based Services
Create		Consent for Eval	Consent for Evaluation
	Create	504 Introduction	Section 504 Introduction & Notice of Rights - Print Only
	Create	504 Invitation	Section 504 Invitation to Attend a Meeting
	Create	504 Consent Form	Section 504 Consent for Evaluation
	Create	504 Manifestation	Section 504 Manifestation Determination
	Create	504 Meeting Notes	Section 504 Meeting Notes

Special Education Documents

Used by both Special Ed and 504 Teams

504 Accommodation Plan Documents

8/5/21

STUDENT SUPPORT PROCESS AND PAPERWORK TIMELINES

Invitation	Parents/Guardians must be given **at least 10 days notice** of a meeting
Referrals	Completed and sent to Student Support Services for processing **within 10 working days** of signed Consent
Evaluations	**Initial and Additional Assessment: 90 days** to evaluate, determine eligibility, and offer services **Reevaluation:** May be 90 days, **may be less**, depending on the date Consent to Evaluate is signed and the standing Reeval due date
Transfer-In Meeting	Must be held **within 10 days** *of School Psychologist/Speech Pathologist reviewing/signing off*
ESER/IEP/Amendment Paperwork	Finalized in Synergy and signature pages sent to Student Support Services **within 10 working days** of the meeting
ESY	Annual IEP meetings held between August and February Parent conference days: complete ESY Eligibility at the annual IEP meeting. Annual IEP meetings held after February Parent conference day: • Hold Annual IEP early • Hold IEP Amendment meeting to address ESY prior to February Parent conference day ESY identification and eligibility process must be completed by **March 4, 2022.** ***After March 4th: Case Managers contact Student Support Assistant Director to discuss adding students for ESY**
Fall ESER/IEP Dates	All IEPs **due on or before September 15th** of the next school year must be completed by the end of the current school year. All Reevaluations **due on or before September 30th** of the next school year must be completed by the end of the current school year.

6/22/21

Where to upload documents (Special Education)

Naming Convention:

StudentInitials_DocumentName_2digitmonth-2digitday-2digit year of the document
For Example: **AZ_IEP_01-01-20** **AZ_PlacementConsent_01-01-20**

*****Please make sure that all documents are right side up; PDF is the preferred format.***
*****Do Not upload password protected documents***

Historical Documents:

- All Testing Information (BASC, Connors, WJ Scores, etc.)
- FBA/BIP (if the independent process is used and not part of an evaluation)
- Check-In/Check-Out plans and data
- Consent for Initial Placement
- Signed Medicaid Consent
- Other Health Impairment Physician Statements
- Reports/Evaluations from Outside Agencies – Please add agency name to upload name
- Release/Authorization to Exchange Info – Please add agency name to upload name
- Quarterly Progress Notes (if not done within the Synergy Progress Report)

Attachments grid within a Process:

- Consent to Evaluate (All Referral Processes)
- Consent for Initial Placement (Initial Process)
- Parent written revocation (Exit Process)

Pages attached within the documents:

- **AK REFERRAL:**
    1. Consent to Evaluate
    2. MTSS/RTI Data
- **ESER:**
    1. Psych/SLP signed Eligibility page
    2. Team signature page from the meeting
- **IEP:**
    1. Alternate Assessment signature page (if applicable)
    2. Team signature page from the meeting
    3. FBA/BIP if completed with an Annual or Amendment
- **Regular IEP Amendments:**
    1. Team signature page from the meeting
- **No Meeting Amendments:**
    1. Case Manager/Related Service Provider signature page
- **Transfer-Ins:**
    1. Psych/SLP signed Cover Review page
    2. Team signature page from the meeting

❖ If you receive a document that isn't listed, contact your Records Technician

8/6/21

Special Education Eligibility Categories

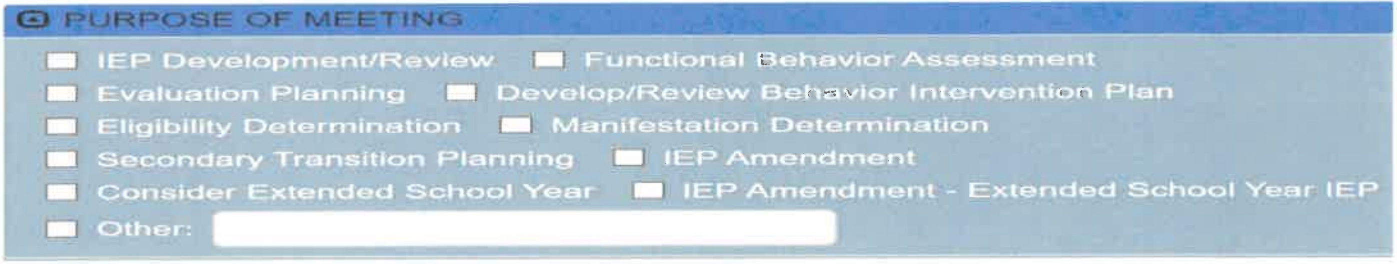
Autism	AUT
Cognitive Impairment	CI
Deafness	DEAF
Deaf-Blind	D/B
Early Childhood Developmental Delay	ECDD
Emotional Disturbance	ED
Hearing Impairment	HI
Multiple Disabilities	MD (a combination of at least 2)
Orthopedic Impairment	OI
Other Health Impairment	OHI
Specific Learning Disability	SLD
Speech or Language Impairment	SLI
Traumatic Brain Injury	TBI
Visual Impairment	VI

Evaluation Categories

AD	Adaptive
APE	Adapted PE
BEH	Behavior
COG	Cognitive
FBA	Functional Behavior Assessment
H	Hearing
R,W,M	Reading, Writing, Math (or whichever is checked on referral)
OT	Occupational Therapy
PT	Physical Therapy
SE	Social/Emotional
SP	Communication (Speech/Language)
V	Vision
Other/FR	Review of documents not included in other areas, etc.

Meeting Invitation Purposes and Definitions

***Check all that apply to an upcoming meeting (does not need to be changed if more happens at the meeting than originally planned)**



PURPOSE OF MEETING

☐ IEP Development/Review ☐ Functional Behavior Assessment
☐ Evaluation Planning ☐ Develop/Review Behavior Intervention Plan
☐ Eligibility Determination ☐ Manifestation Determination
☐ Secondary Transition Planning ☐ IEP Amendment
☐ Consider Extended School Year ☐ IEP Amendment - Extended School Year IEP
☐ Other:

IEP Development/Review – Writing or review of an IEP, whether an Initial or Annual.

Evaluation Planning – Team meeting to discuss/propose an evaluation, and determine testing areas. Consent to Evaluate will be signed as appropriate. (Initial Eval, 3 Year Re-Eval, Additional Assessment).

Eligibility Determination- Review of assessment results, and determining qualifying areas and needs. (Initial, 3 Year Re-Eval, Additional Assessment).

Secondary Transition Planning – Section of the IEP that addresses a student's plans post-high school; ages 15 years and older (Transition Plan must be in place by the Student's 16th Birthday).

Consider Extended School Year – Discussing/considering summer extended services (typically done at the Annual IEP Review).

Functional Behavior Assessment – Discussing/evaluating a student's behavior, and determining the need for supports and accommodations.

Develop/Review Behavior Intervention Plan – Plan written to be implemented to provide supports and accommodations related to a student's behaviors.

Manifestation Determination – If a student is suspended for 10 or more days, a meeting is held to determine if the behavior manifesting is a direct result of their disability.

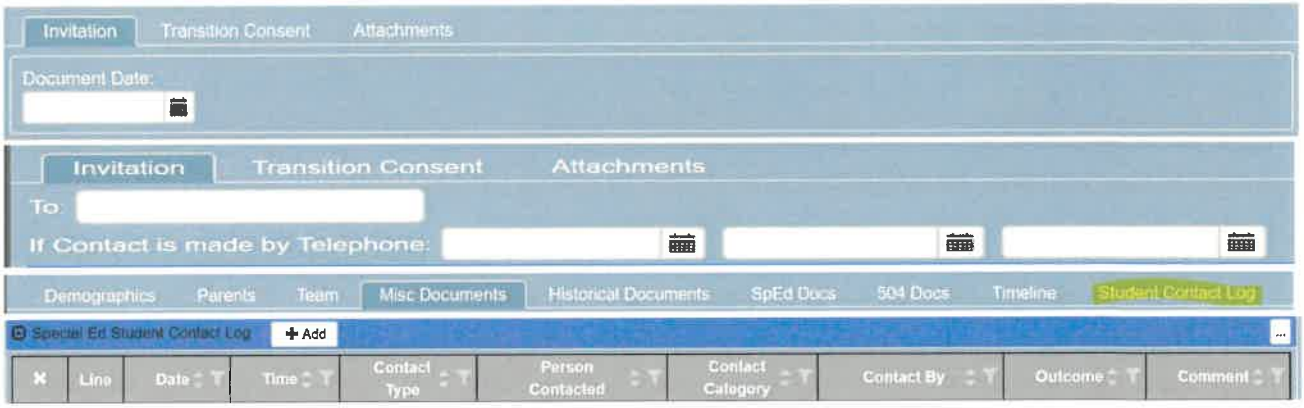
IEP Amendment – Making changes or revisions to the current Annual IEP.

IEP Amendment–Extended School Year IEP – Meeting to review data, make determination regarding summer services and revise IEP, if not done previously at the Annual Review.

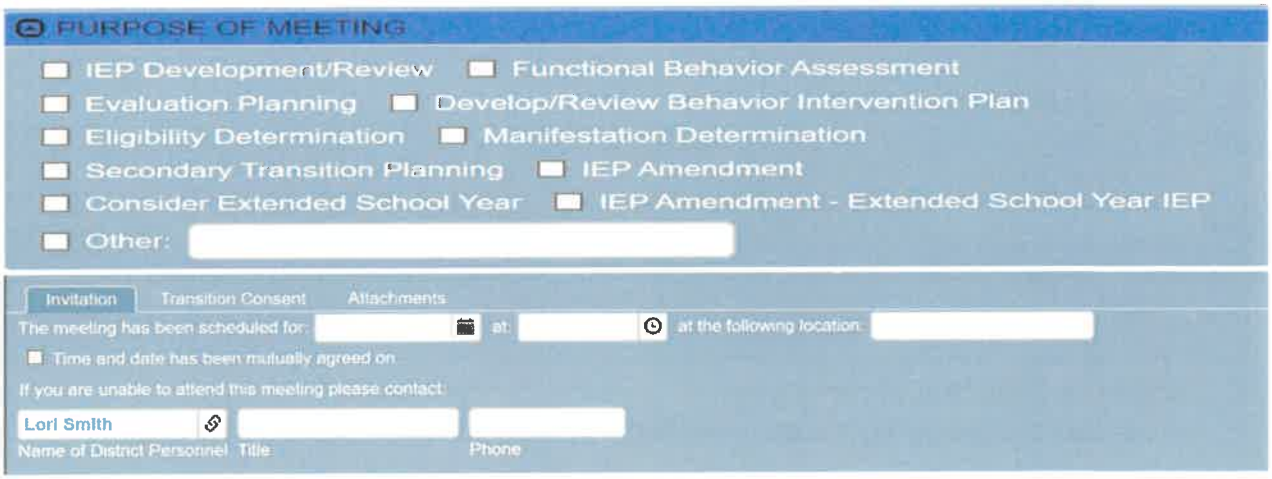
Other – Most common is: **Transfer-In** – Review of an out of district evaluation and IEP to determine if student qualifies for services in Mat-Su. Changes may be made to the IEP to align with Mat-Su guidelines.

Creating/Reviewing a Synergy SE Invitation

A. Invitation Tab

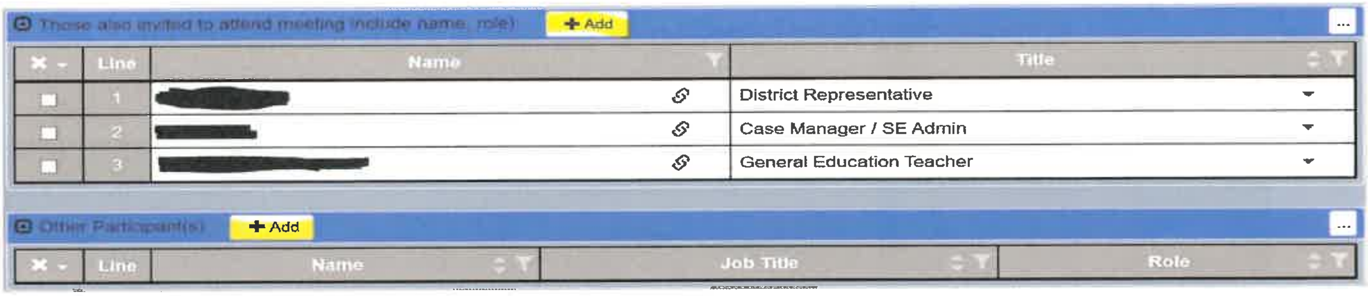

Invitation
Transition Consent
Attachments
Document Date:
Invitation
Transition Consent
Attachments
To:
If Contact is made by Telephone:
Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
Special Ed Student Contact Log
+ Add
Line
Date
Time
Contact Type
Person Contacted
Contact Category
Contact By
Outcome
Comment

1. Date Invitation is created is entered
2. Parent/Guardian name(s) entered in the "To" box
3. Attempts to contact Parent/Guardian are noted in the date boxes
   a. A minimum of 3 attempts are required; if no response meeting can be set by team
   b. Contact should also be documented in the Student Contact Log
4. Team may then set a meeting date and time; the Invitation is sent home
   a. Can be emailed, sent via postal service, or sent home with the student


PURPOSE OF MEETING
IEP Development/Review
Functional Behavior Assessment
Evaluation Planning
Develop/Review Behavior Intervention Plan
Eligibility Determination
Manifestation Determination
Secondary Transition Planning
IEP Amendment
Consider Extended School Year
IEP Amendment - Extended School Year IEP
Other:
Invitation
Transition Consent
Attachments
The meeting has been scheduled for:
at:
at the following location:
Time and date has been mutually agreed on
If you are unable to attend this meeting please contact:
Name of District Personnel
Title
Phone

Name of District Personnel: Lori Smith

1. Purpose/Type of the Meeting is identified (check all that apply)
   - Meeting Purpose Definitions: Appendix Page vii
2. Meeting information must be completed (date, time and location)
3. If meeting was scheduled with parent/guardian, "mutually agreed on" box must be checked
4. Designate who parents/guardians should contact for questions, or if they cannot attend

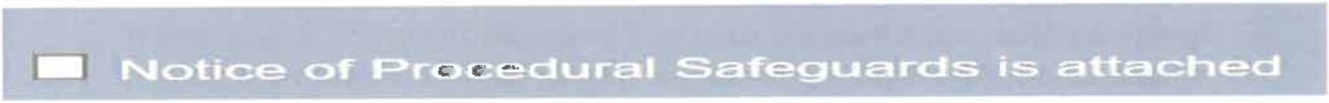

Those also invited to attend meeting (include name, role) + Add

Line	Name	Title
1	[redacted]	District Representative
2	[redacted]	Case Manager / SE Admin
3	[redacted]	General Education Teacher

Other Participant(s) + Add

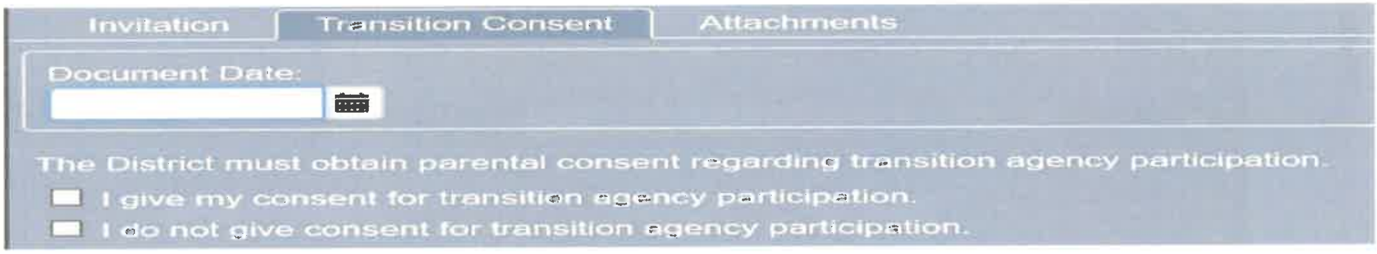
Line	Name	Job Title	Role

1. Staff Names and Title/Role at the meeting must be entered and clearly indicated (gridlines can be added by using the +Add button)
    a. Typically a meeting requires 3 primary roles: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
    b. This means a **minimum of 3 persons**. One person cannot fill more than one primary role at the same meeting (for example, the Case Manager cannot also be District Rep)
    c. For students attending Mat-Su Day School, Mat-Su Secondary, or *Preschool a General Ed Teacher is not required (*unless Preschool meeting is for Kindergarten transition)
    d. Attendees from an agency, or any other outside participants, can be listed in the Other Participants grid


☐ Notice of Procedural Safeguards is attached

1. Box should be checked if a copy of the Procedural Safeguards will be emailed or Mailed with the Invitation

B. Transition Consent Tab



Document Date:

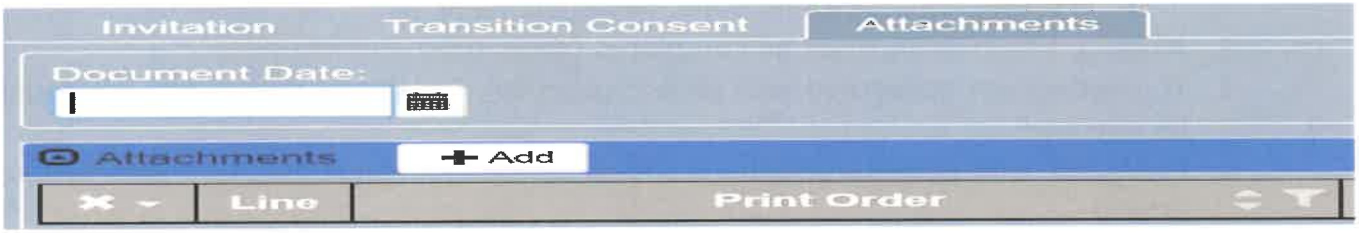
The District must obtain parental consent regarding transition agency participation.

☐ I give my consent for transition agency participation.

☐ I do not give consent for transition agency participation.

1. Document Date would carry over
2. Addressed if outside agencies have been invited for High School Transitions

C. Attachments Tab



Document Date:

Attachments + Add

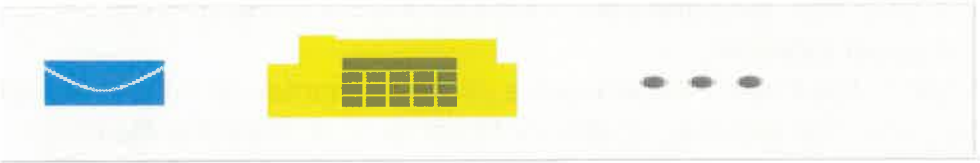
Line	Print Order

1. Document Date would carry over
2. If Transition Agency Consent has been signed, it can be uploaded here

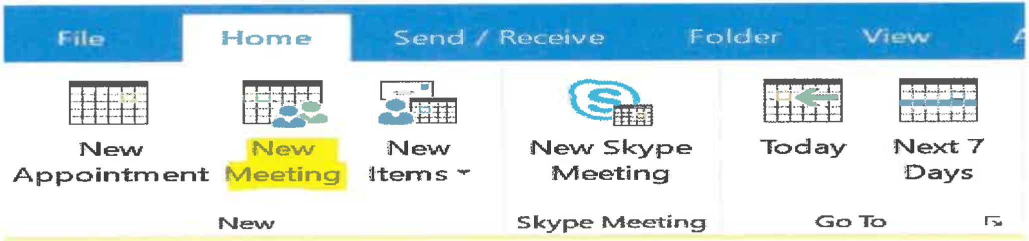
- Invitations **should not be modified** once sent to team and parents. It documents who was invited. The meeting Signature Page documents who actually attended.

Tips for Creating an Outlook Meeting Invitation

On the bottom left of the Outlook page find the Calendar icon:

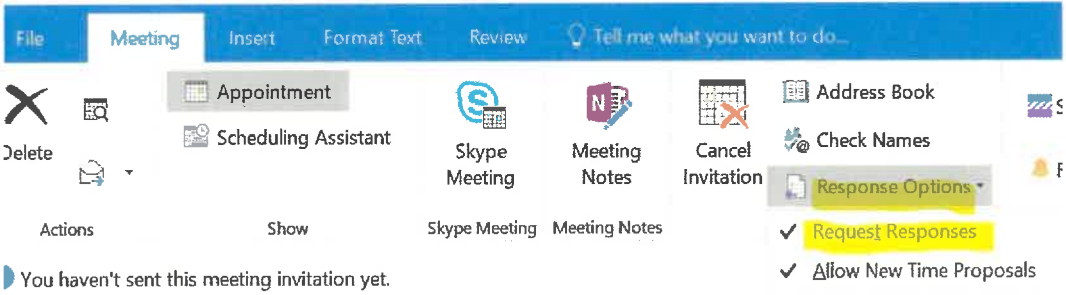


Choose New Meeting from the options at the top of the Home tab:


File
Home
Send / Receive
Folder
View
New Appointment
New Meeting
New Items
New Skype Meeting
Today
Next 7 Days
New
Skype Meeting
Go To

Optional Helpful Items: In the top of the Meeting menu you can:

Request responses from the meeting participants, to confirm they received the invitation

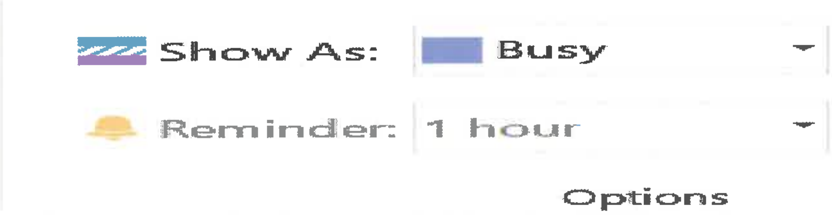

File
Meeting
Insert
Format Text
Review
Tell me what you want to do...
Delete
Appointment
Scheduling Assistant
Skype Meeting
Meeting Notes
Cancel Invitation
Address Book
Check Names
Response Options
Actions
Show
Skype Meeting
Meeting Notes

✓ Request Responses

✓ Allow New Time Proposals

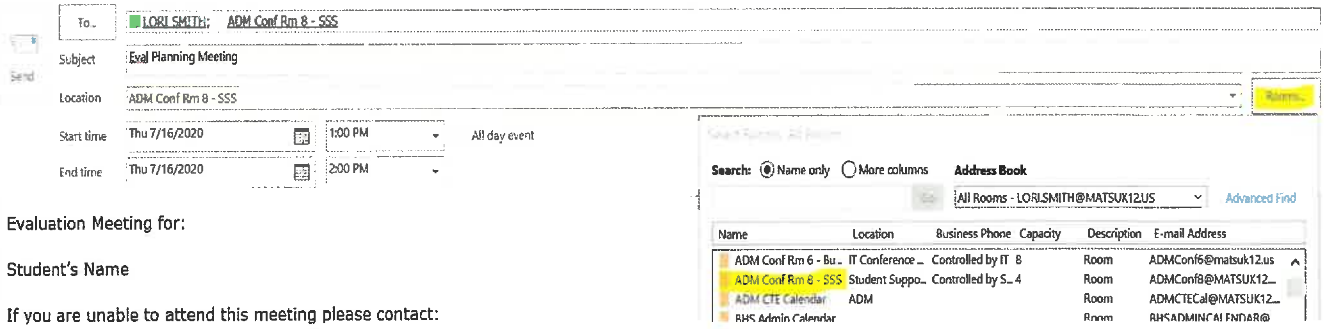
You haven't sent this meeting invitation yet.

Choose a status to show on Calendars, and schedule a meeting Reminder to pop up, at whatever timeframe desired (number of hours before; a day before, etc.)



Show As: Busy

Reminder: 1 hour


Send
Rooms...
Advanced Find

To... LORI SMITH; ADM Conf Rm 8 - SSS

Subject: Eval Planning Meeting

Location: ADM Conf Rm 8 - SSS

Start time: Thu 7/16/2020 1:00 PM

End time: Thu 7/16/2020 2:00 PM

All day event

Evaluation Meeting for:

Student's Name

If you are unable to attend this meeting please contact:

Search: ● Name only ○ More columns

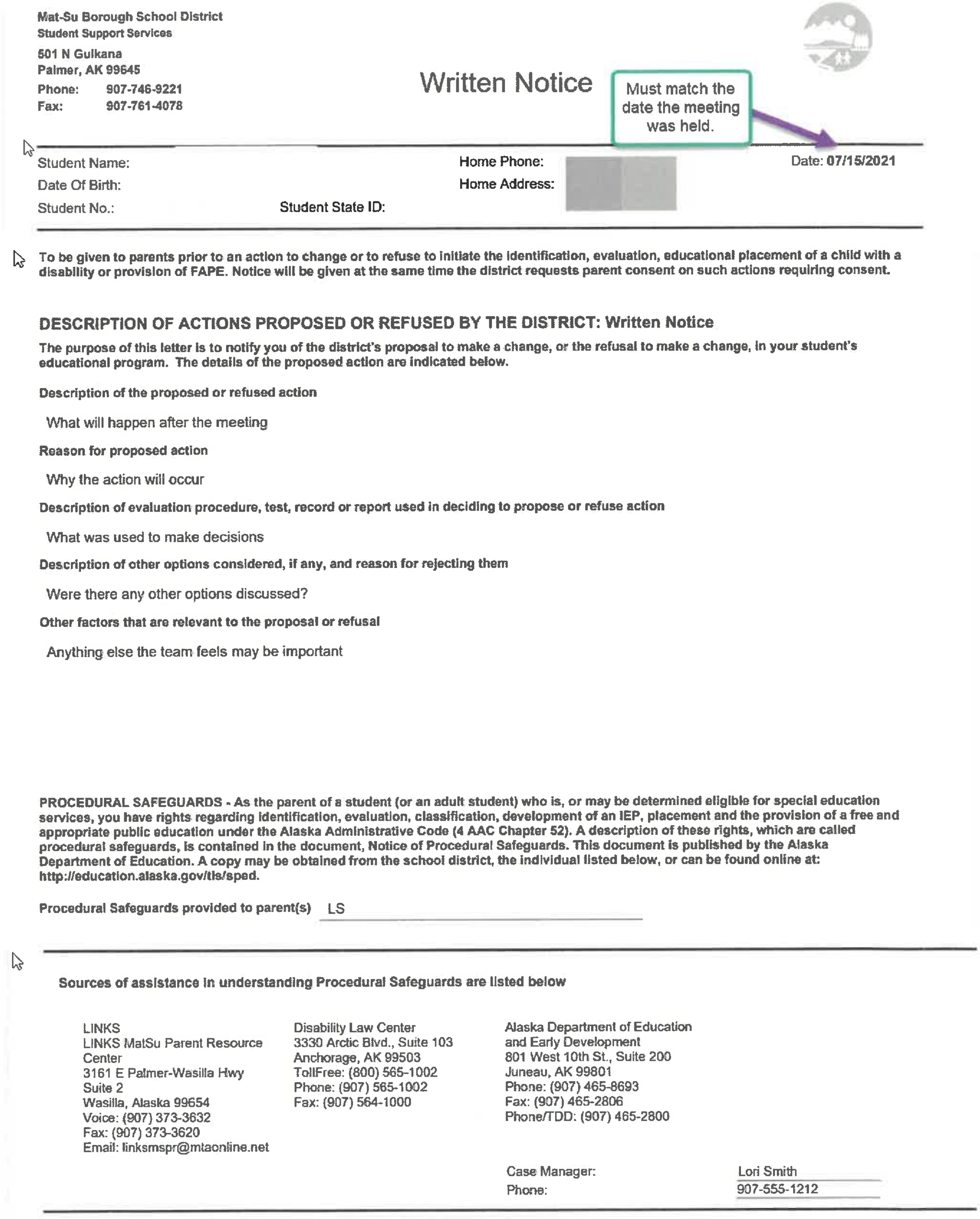
Address Book: All Rooms - LORI.SMITH@MATSUK12.US

Name	Location	Business Phone	Capacity	Description	E-mail Address
ADM Conf Rm 6 - Bu...	IT Conference ...	Controlled by IT	8	Room	ADMConf6@matsuk12.us
ADM Conf Rm 8 - SSS	Student Suppo...	Controlled by S...	4	Room	ADMConf8@MATSUK12...
ADM CTE Calendar	ADM			Room	ADMCTECal@MATSUK12...
BHS Admin Calendar				Room	BHSADMINCALENDAR@

- Add all members of the school team to the invitation as applicable. The "To" button will open the District employee address list. You can find people, and possibly the Conference Room at your site. (Include yourself if you want a copy, and the meeting to populate on your personal calendar)
- Enter a Subject in the Subject line. Do not use a student's names or initials. Purpose of the meeting can be used (IEP Meeting, Eligibility Meeting, Eval Planning Meeting)
- Enter the Location of the meeting. (If the Invitation has the Rooms button on the right, you may be able to choose a Conference Room at your site, and the Meeting may populate to a master calendar if you have access to it)
- Enter the meeting date and the start/end times
- In the body of the invitation the student can be identified, and any other information can be added (i.e. who the team should contact if they cannot attend the meeting)
- Click "Send" when Invitation is complete

Written Notice (WN)

IDEA requires that the district provide the parent with a Written Notice any time the district proposes or refuses to initiate or change the identification, evaluation, placement, or IEP. This WN is to reflect what action will occur following the IEP meeting; not what will occur at the meeting.



Mat-Su Borough School District
Student Support Services
501 N Gulkana
Palmer, AK 99645
Phone: 907-746-9221
Fax: 907-761-4078

Written Notice

Must match the date the meeting was held.

Student Name:
Date Of Birth:
Student No.:
Student State ID:
Home Phone:
Home Address:
[redacted]
Date: **07/15/2021**

To be given to parents prior to an action to change or to refuse to initiate the identification, evaluation, educational placement of a child with a disability or provision of FAPE. Notice will be given at the same time the district requests parent consent on such actions requiring consent.

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Written Notice

The purpose of this letter is to notify you of the district's proposal to make a change, or the refusal to make a change, in your student's educational program. The details of the proposed action are indicated below.

Description of the proposed or refused action

What will happen after the meeting

Reason for proposed action

Why the action will occur

Description of evaluation procedure, test, record or report used in deciding to propose or refuse action

What was used to make decisions

Description of other options considered, if any, and reason for rejecting them

Were there any other options discussed?

Other factors that are relevant to the proposal or refusal

Anything else the team feels may be important

PROCEDURAL SAFEGUARDS - As the parent of a student (or an adult student) who is, or may be determined eligible for special education services, you have rights regarding identification, evaluation, classification, development of an IEP, placement and the provision of a free and appropriate public education under the Alaska Administrative Code (4 AAC Chapter 52). A description of these rights, which are called procedural safeguards, is contained in the document, Notice of Procedural Safeguards. This document is published by the Alaska Department of Education. A copy may be obtained from the school district, the individual listed below, or can be found online at: http://education.alaska.gov/tls/sped.

Procedural Safeguards provided to parent(s) LS

Sources of assistance in understanding Procedural Safeguards are listed below

LINKS
LINKS MatSu Parent Resource Center
3161 E Palmer-Wasilla Hwy
Suite 2
Wasilla, Alaska 99654
Voice: (907) 373-3632
Fax: (907) 373-3620
Email: linksmspr@mtaonline.net

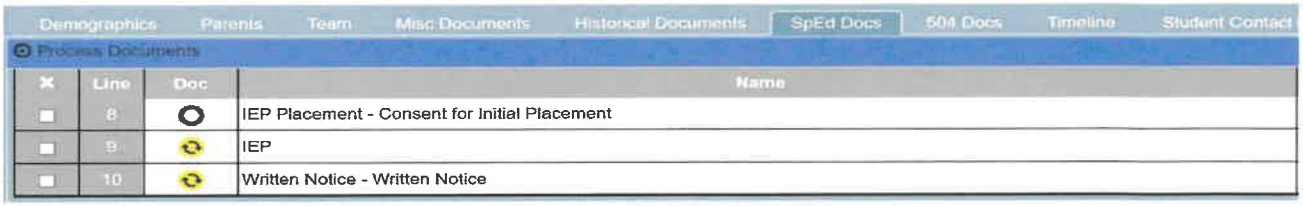
Disability Law Center
3330 Arctic Blvd., Suite 103
Anchorage, AK 99503
TollFree: (800) 565-1002
Phone: (907) 565-1002
Fax: (907) 564-1000

Alaska Department of Education and Early Development
801 West 10th St., Suite 200
Juneau, AK 99801
Phone: (907) 465-8693
Fax: (907) 465-2806
Phone/TDD: (907) 465-2800

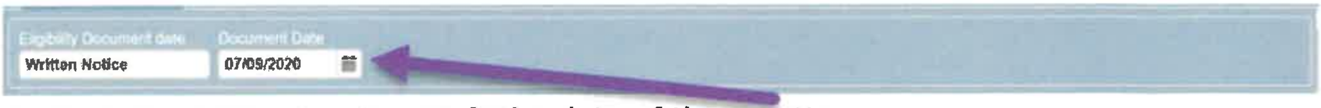
Case Manager: Lori Smith
Phone: 907-555-1212

Reviewing a Meeting Written Notice

Student SE Record>SpEd Docs tab>Process Documents



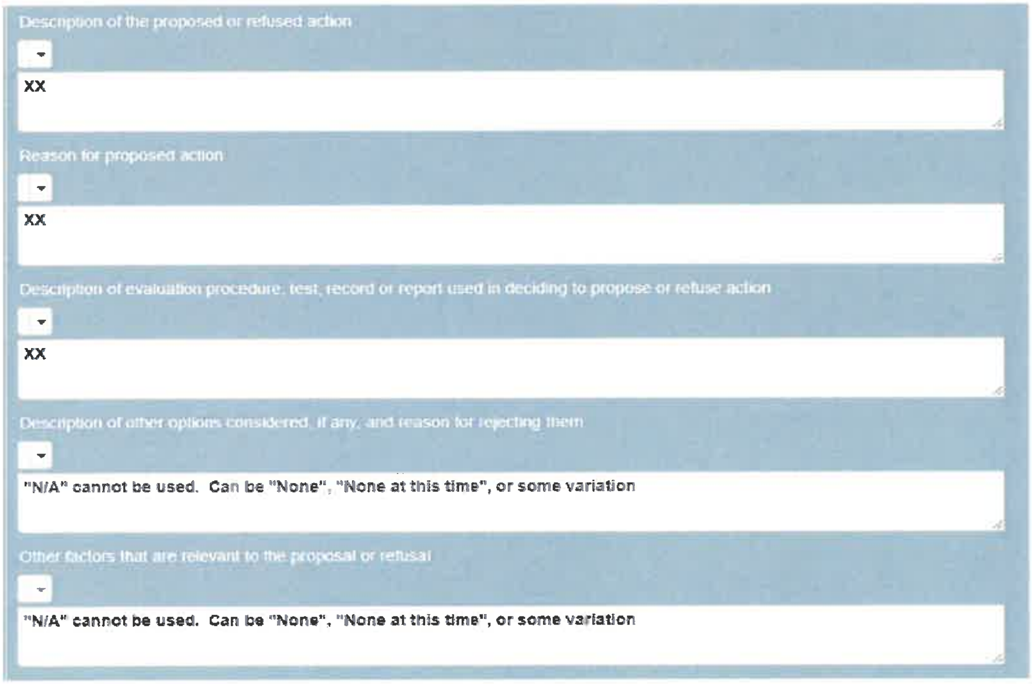
✕	Line	Doc	Name
☐	8	○	IEP Placement - Consent for Initial Placement
☐	9		IEP
☐	10		Written Notice - Written Notice



Eligibility Document date: Written Notice

Document Date: 07/09/2020

1. Document Date **must match** the date of the meeting



Description of the proposed or refused action: xx

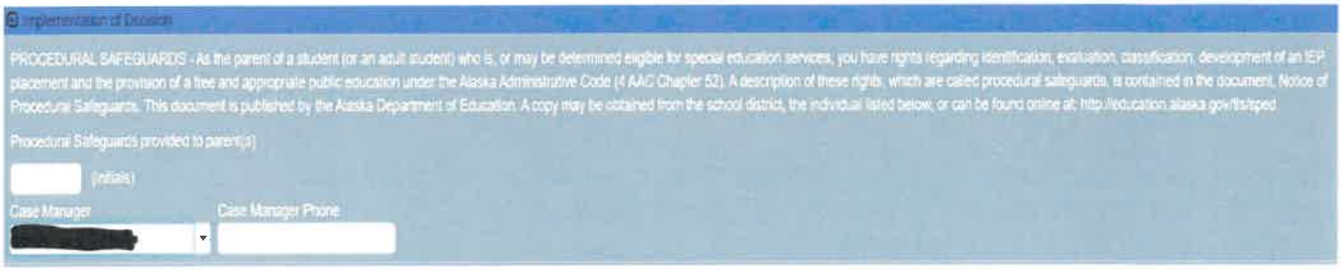
Reason for proposed action: xx

Description of evaluation procedure, test, record or report used in deciding to propose or refuse action: xx

Description of other options considered, if any, and reason for rejecting them: "N/A" cannot be used. Can be "None", "None at this time", or some variation

Other factors that are relevant to the proposal or refusal: "N/A" cannot be used. Can be "None", "None at this time", or some variation

1. All 5 boxes of the Written Notice must have an entry
    a."N/A" cannot be used. Can be "None", "None at this time", or some variation



PROCEDURAL SAFEGUARDS - As the parent of a student (or an adult student) who is, or may be determined eligible for special education services, you have rights regarding identification, evaluation, classification, development of an IEP, placement and the provision of a free and appropriate public education under the Alaska Administrative Code (4 AAC Chapter 52). A description of these rights, which are called procedural safeguards, is contained in the document, Notice of Procedural Safeguards. This document is published by the Alaska Department of Education. A copy may be obtained from the school district, the individual listed below, or can be found online at: http://education.alaska.gov/tls/sped

Procedural Safeguards provided to parent(s)

(initials)

Case Manager: [redacted]

Case Manager Phone

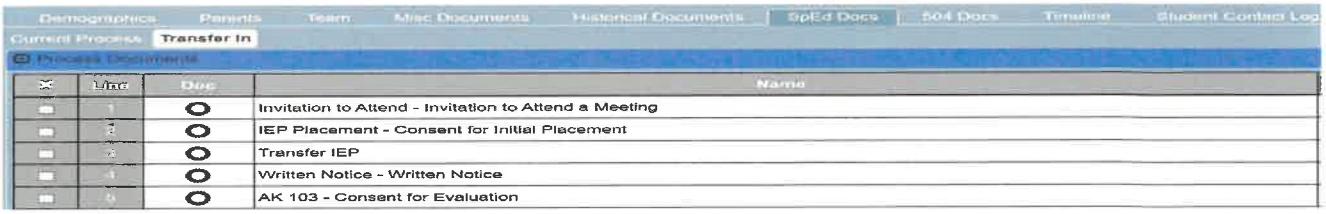
1. Case Manager enters initials confirming Procedural Safeguards were provided/offered
2. Case Manager chooses name from the dropdown
3. Case Manager enters a contact phone number

Reviewing a Transfer IEP

(Invitation and Written Notice within the Process should be used)

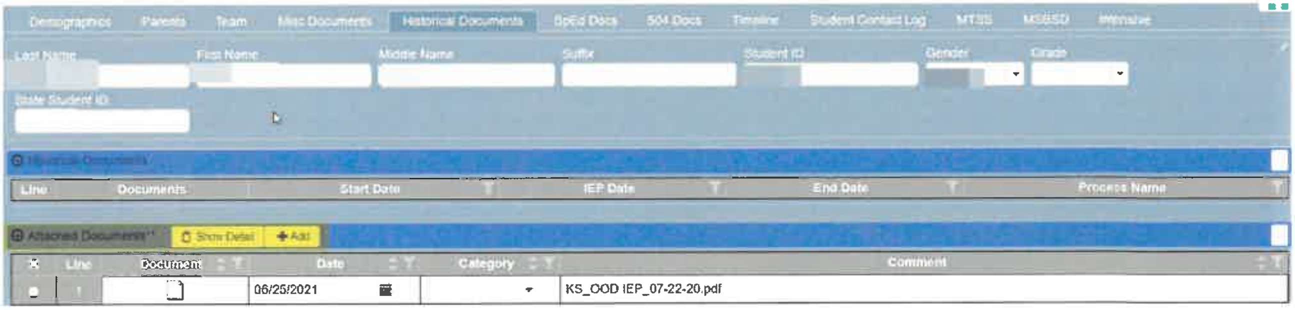
****Synergy SE Record will be created by Student Support when official records are received**

Student SE Record>SpEd Docs tab>Process Documents>Transfer IEP:


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
Current Process
Transfer In
Process Documents

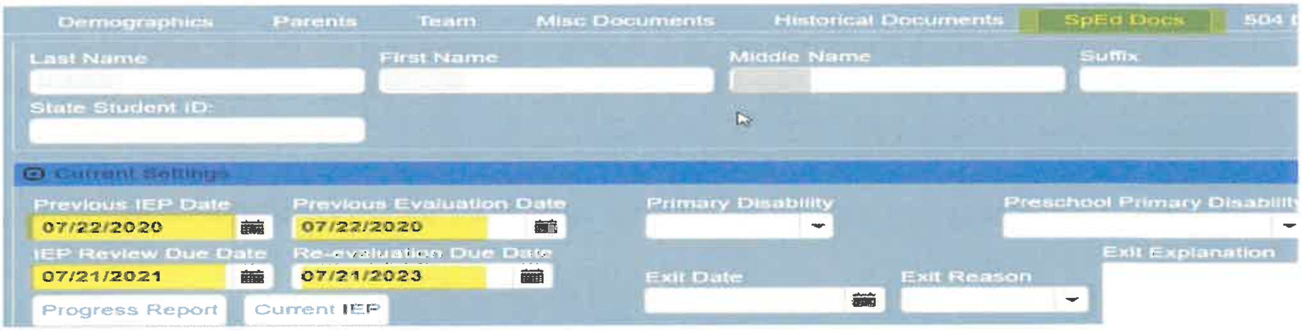
Line	Doc	Name
1	○	Invitation to Attend - Invitation to Attend a Meeting
2	○	IEP Placement - Consent for Initial Placement
3	○	Transfer IEP
4	○	Written Notice - Written Notice
5	○	AK 103 - Consent for Evaluation

Records Technician will upload the official Special Ed Records under the Historical Documents tab, using the Naming Convention, and "OOD" for 'Out of District':


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
MTSS
MSBSD
Intensive
Last Name
First Name
Middle Name
Suffix
Student ID
Gender
Grade
State Student ID
Historical Documents
Line
Documents
Start Date
IEP Date
End Date
Process Name
Attached Documents
Show Detail
Add

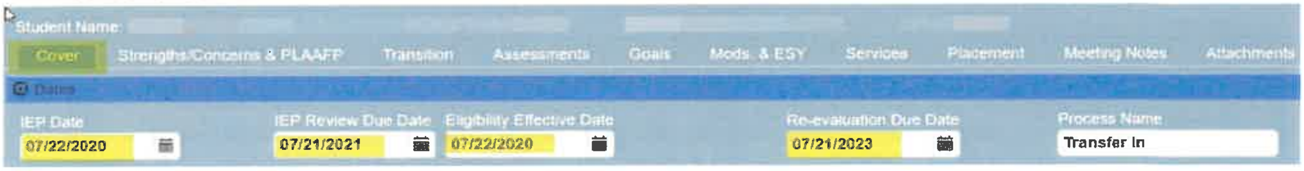
Line	Document	Date	Category	Comment
1		06/25/2021		KS_OOD IEP_07-22-20.pdf

Records Technician will enter current IEP and Eligibility dates in the Sped Docs tab:


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504
Last Name
First Name
Middle Name
Suffix
State Student ID:
Current Settings
Primary Disability
Preschool Primary Disability
Exit Explanation
Exit Date
Exit Reason
Progress Report
Current IEP

Previous IEP Date: 07/22/2020
Previous Evaluation Date: 07/22/2020
IEP Review Due Date: 07/21/2021
Re-evaluation Due Date: 07/21/2023

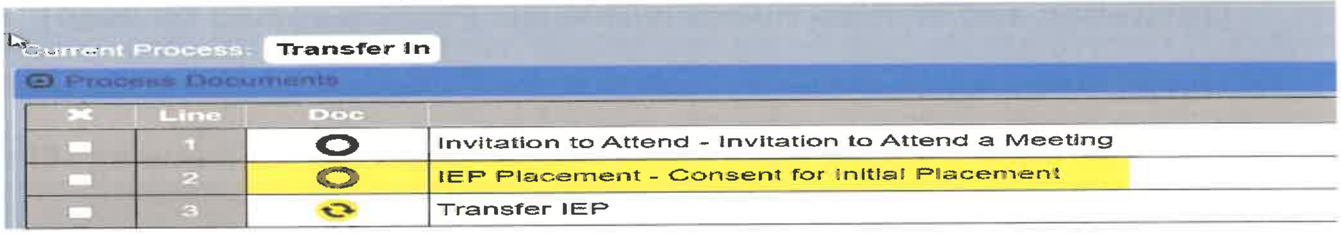
And on the Cover page of the Transfer IEP document:


Student Name:
Cover
Strengths/Concerns & PLAAFP
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Dates

IEP Date: 07/22/2020
IEP Review Due Date: 07/21/2021
Eligibility Effective Date: 07/22/2020
Re-evaluation Due Date: 07/21/2023
Process Name: Transfer In

- Once the Synergy SE record is set up and ready, the Records Technician will email a copy of records and a Transfer-In checklist to the Team.
- If the student is in the custody of OCS and in a Foster Placement, the team will need to have a Foster Affirmation form completed at the meeting.

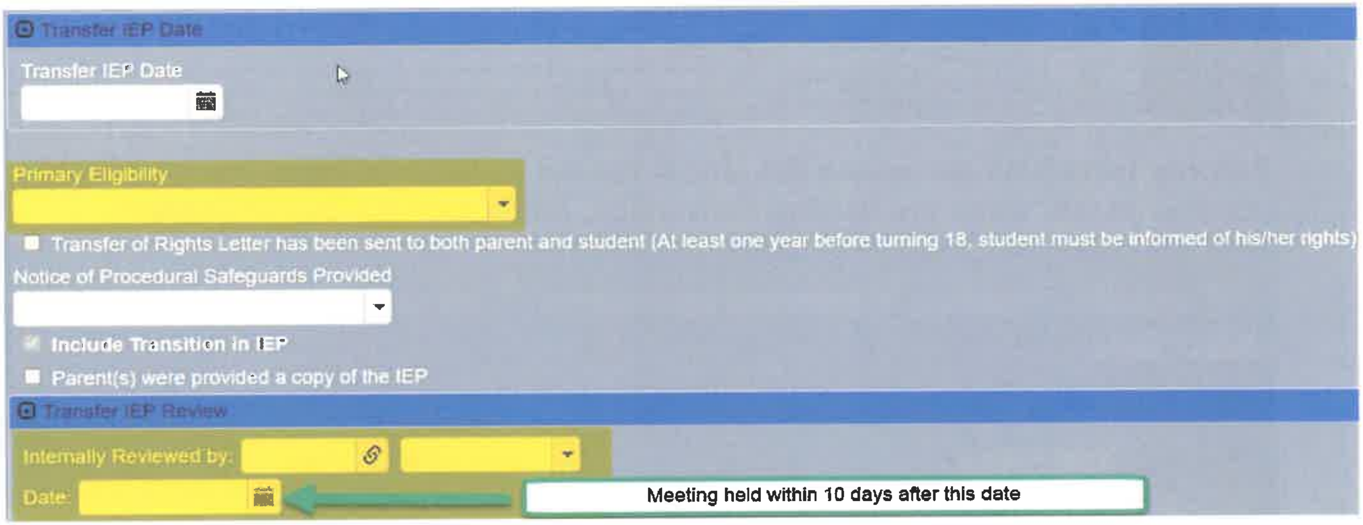
◆ If a Consent for Initial Placement does not come with the Out of District records, the Records Technician will request the Team have one signed at the Transfer-In meeting:



Current Process: Transfer In

Process Documents

X	Line	Doc	
▬	1	○	Invitation to Attend - Invitation to Attend a Meeting
▬	2	○	IEP Placement - Consent for Initial Placement
▬	3	⟳	Transfer IEP



Transfer IEP Date

Transfer IEP Date

Primary Eligibility

☐ Transfer of Rights Letter has been sent to both parent and student (At least one year before turning 18, student must be informed of his/her rights)

Notice of Procedural Safeguards Provided

☑ Include Transition in IEP

☐ Parent(s) were provided a copy of the IEP

Transfer IEP Review

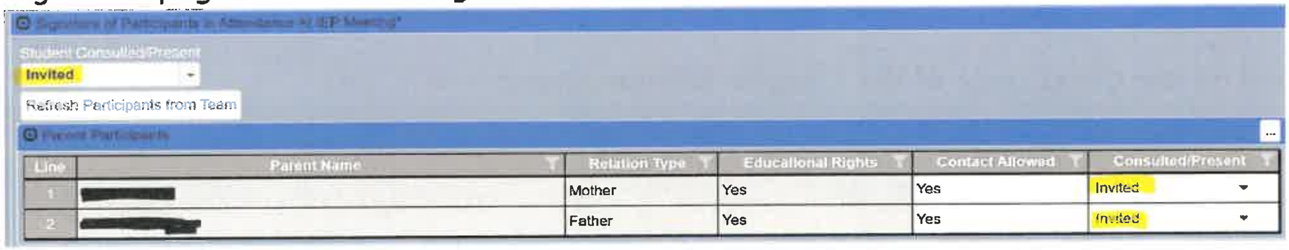
Internally Reviewed by:

Date:

Meeting held within 10 days after this date

1. School Psychologist, or Speech Language Pathologist if student is speech only, will review Out of District Evaluation and eligibility category to determine whether it meets MSBSD eligibility criteria
2. School Psychologist/SLP will choose the Primary Eligibility from the dropdown
3. School Psychologist/SLP will sign off by entering his/her name, credentials, and the date documents were reviewed
4. School Psychologist/SLP will print the cover page for handwritten signature and date
5. Transfer-In meeting can now be scheduled, and must be held **within 10 days** of date

Signature page for the meeting is created on the Cover tab:



Signatures of Participants in Attendance At IEP Meeting*

Student Consulted/Present

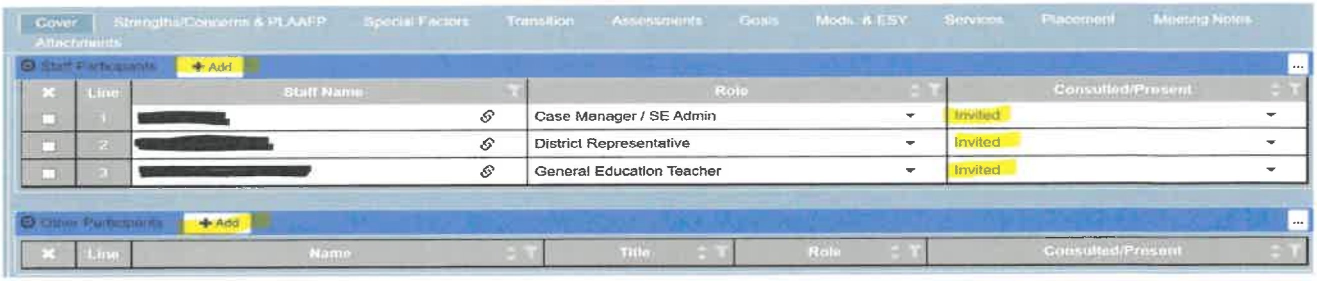
Invited

Refresh Participants from Team

Parent Participants

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	[redacted]	Mother	Yes	Yes	Invited
2	[redacted]	Father	Yes	Yes	Invited

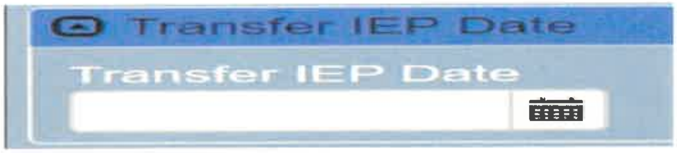
1. Student Consulted/Present box should have "Invited" in the dropdown
2. Parent/Guardian information will auto-populate from the Student Information System.
    a. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Staff Participants
+ Add
Other Participants
+ Add

✖	Line	Staff Name	Role	Consulted/Present
☐	1	[redacted]	Case Manager / SE Admin	Invited
☐	2	[redacted]	District Representative	Invited
☐	3	[redacted]	General Education Teacher	Invited

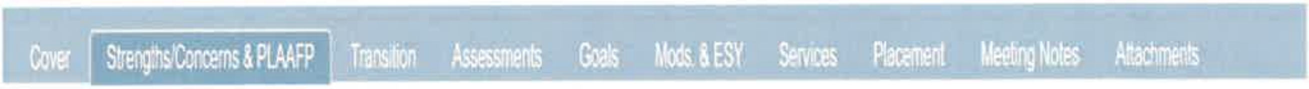
✖	Line	Name	Title	Role	Consulted/Present

1. Staff Names and Title/Role at the meeting must be entered and clearly indicated (gridlines can be added by using the +Add button)
   a. Typically a meeting requires 3 primary roles: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
   b. This means a minimum of 3 persons. One person cannot fill more than one primary role a meeting (i.e. the Case Manager cannot also be District Rep)
   c. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page
2. Attendees from an outside agency, or any other participants, can be identified/added under the Other Participants grid, using the +Add button


Transfer IEP Date
Transfer IEP Date

1. Transfer IEP Date is the date of the meeting

Note: Not all areas of an IEP are included in the Transfer-IEP:


Cover
Strengths/Concerns & PLAAFP
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments

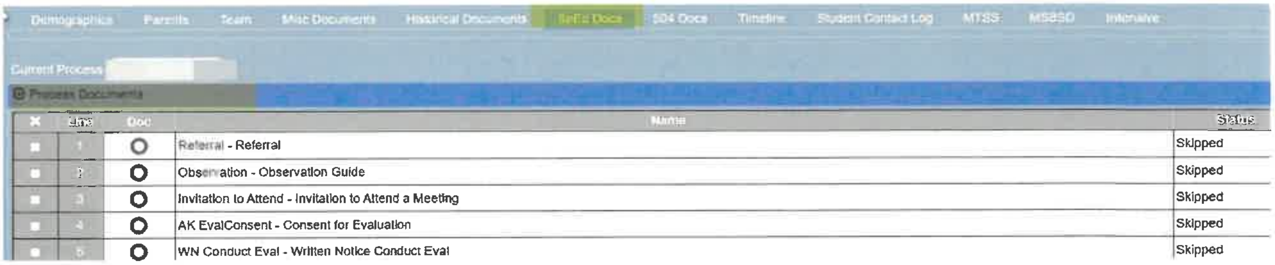
1. Case Managers (and other team members as appropriate) will transfer the information from the Out of District IEP into the Transfer-IEP fields, modifying and amending as needed, to fit MSBSD programs
   (for example, Anchorage School District's total service minutes are more than 1800, so team would adjust service page to reflect MSBSD services)

- See "Reviewing an IEP" for all section-specific information
  1. Case Manager completes documents and any items that flag from Validation
  2. Records Specialist will review Transfer IEP and Written Notice (using **Print Preview** is recommended, so all fields of the document are visible)
  3. Records Specialist will upload Psych/SLP signed eligibility page, and the meeting signature page, to Attachments tab
  4. Records Specialist will contact Case Manager and/or providers to request corrections or clarify any information
  5. Case Manager will Finalize the documents when review and corrections are complete

- If Team agrees student needs to be reevaluated immediately, the Consent for Evaluation is signed at Transfer IEP meeting. The Reevaluation process would then be followed.

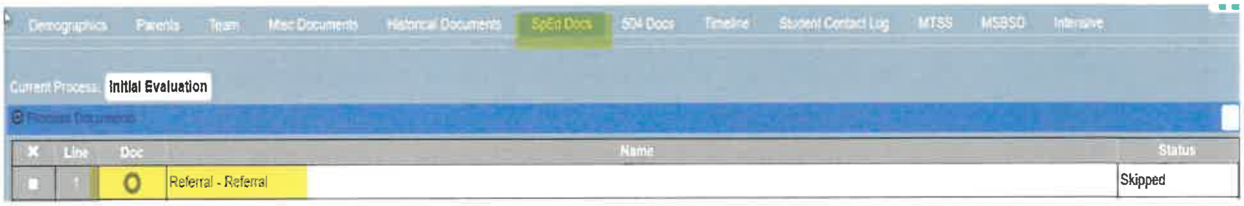
Reviewing an Evaluation Referral Packet

Student SE Record>SpEd Docs tab>Process Documents:


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
MTSS
MSBSD
Intensive
Current Process
Process Documents

✖	Line	Doc	Name	Status
■	1	○	Referral - Referral	Skipped
■	2	○	Observation - Observation Guide	Skipped
■	3	○	Invitation to Attend - Invitation to Attend a Meeting	Skipped
■	4	○	AK EvalConsent - Consent for Evaluation	Skipped
■	5	○	WN Conduct Eval - Written Notice Conduct Eval	Skipped

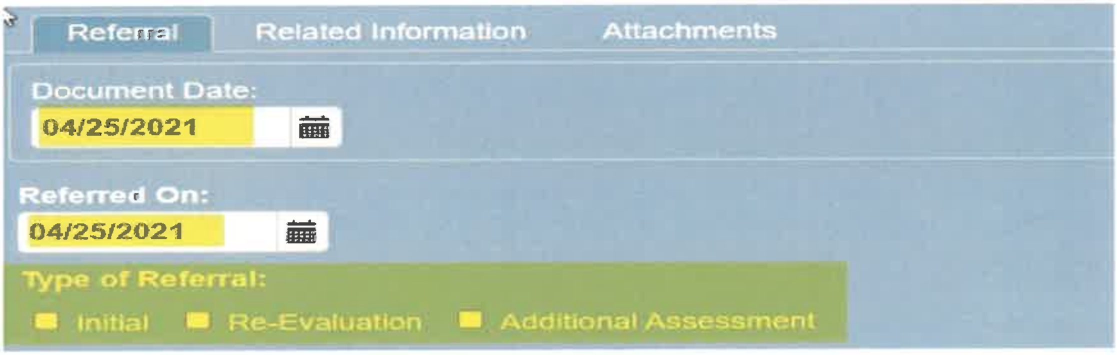
1. Referral Form


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
MTSS
MSBSD
Intensive
Process Documents

Current Process: Initial Evaluation

✖	Line	Doc	Name	Status
■	1	○	Referral - Referral	Skipped

A. Referral Tab

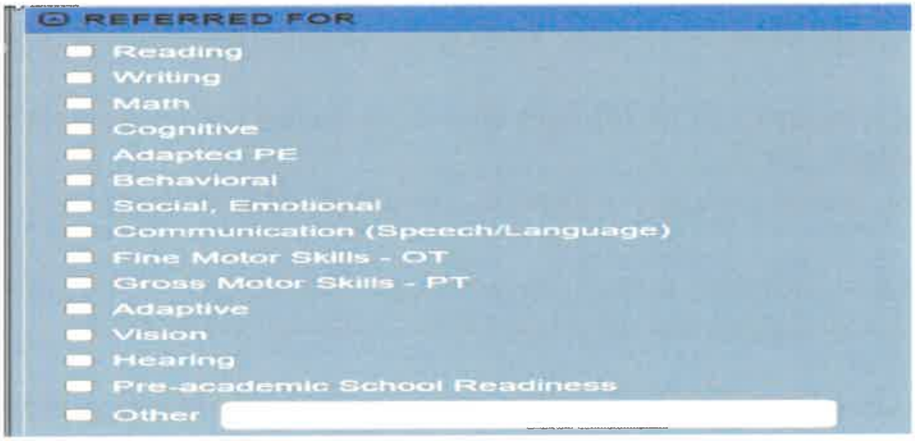

Referral
Related Information
Attachments

Document Date: 04/25/2021

Referred On: 04/25/2021

Type of Referral:
☐ Initial ☐ Re-Evaluation ☐ Additional Assessment

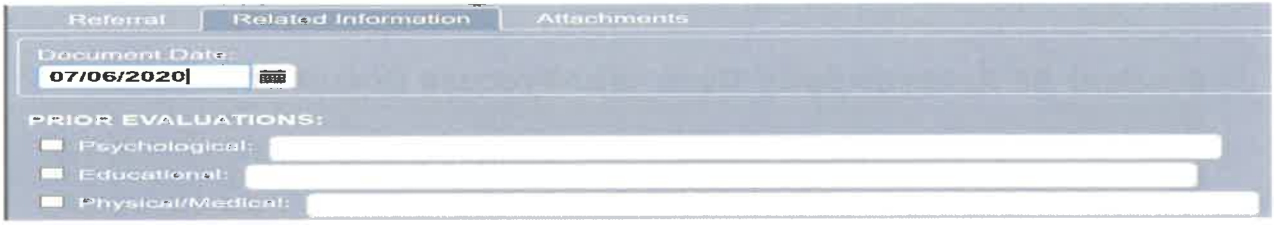
1. Document Date must be entered
2. Referred On Date must be entered (must match date Consent was signed)
3. Type of Referral/Evaluation must be identified



REFERRED FOR
- ☐ Reading
- ☐ Writing
- ☐ Math
- ☐ Cognitive
- ☐ Adapted PE
- ☐ Behavioral
- ☐ Social, Emotional
- ☐ Communication (Speech/Language)
- ☐ Fine Motor Skills - OT
- ☐ Gross Motor Skills - PT
- ☐ Adaptive
- ☐ Vision
- ☐ Hearing
- ☐ Pre-academic School Readiness
- ☐ Other

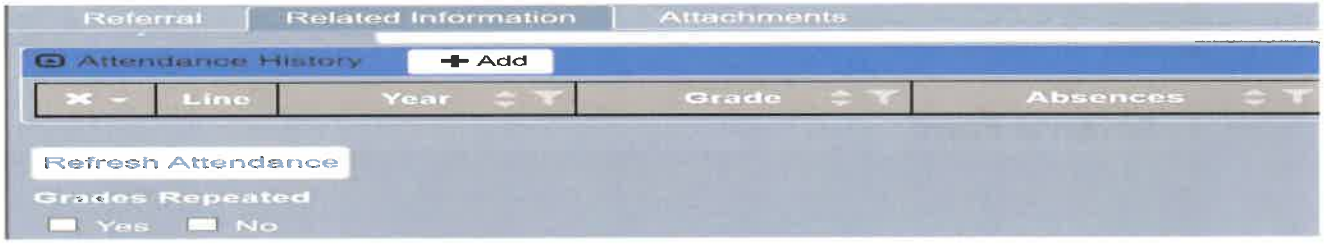
4. Areas to be evaluated are checked under "Referred For"
   a. Areas must match those checked on the signed Consent to Evaluate

B. Related Information Tab

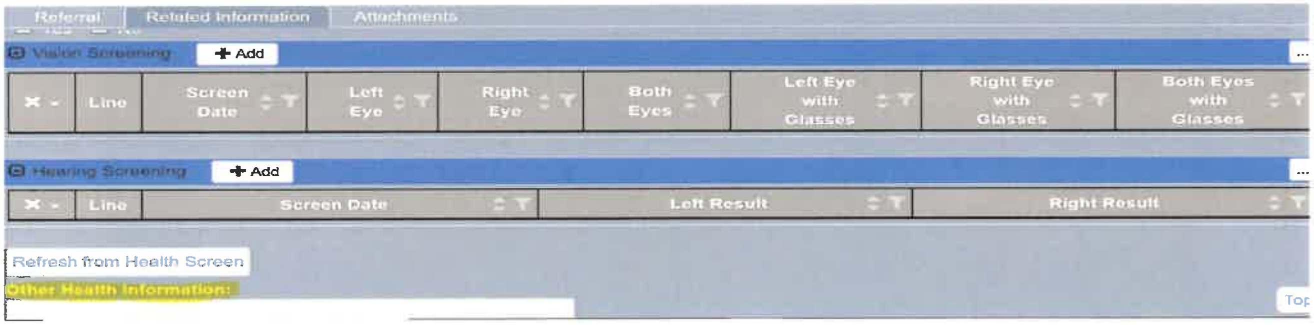

Referral
Related Information
Attachments
PRIOR EVALUATIONS:
☐ Psychological:
☐ Educational:
☐ Physical/Medical:

Document Date: 07/06/2020

1. Document Date will carry over
2. Any prior evaluations and the dates can be noted


Referral
Related Information
Attachments
Attendance History
+ Add
Line
Year
Grade
Absences
Refresh Attendance
Grades Repeated
☐ Yes
☐ No

3. Attendance History is required
   a. Can be pulled from Student Information System using the "Refresh Attendance" button
   b. Only the current and previous year are needed; others can be deleted
4. Grades Repeated must be checked


Referral
Related Information
Attachments
Vision Screening
+ Add
Line
Screen Date
Left Eye
Right Eye
Both Eyes
Left Eye with Glasses
Right Eye with Glasses
Both Eyes with Glasses
Hearing Screening
+ Add
Line
Screen Date
Left Result
Right Result
Refresh from Health Screen
Other Health Information:
Top

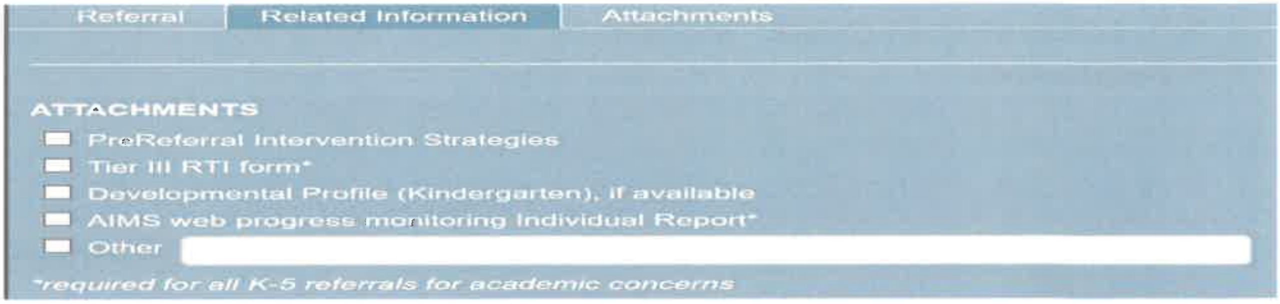
5. Vision and Hearing Screen data is required
   a. Can be pulled from SIS by using the "Refresh from Health Screen" button

- If there is no data, or the screens are more than a calendar year old at the time of referral, Case Manager needs to request screenings be completed by the School Nurse.
  a. Once complete, results can be brought over if the Nurse has entered them into the Health Screen, OR
  b. Results can be added manually if needed, using the +ADD buttons

- **If the student FAILS** either/both screens, Case Manager must contact the School Psychologist. The School Psychologist determines if the evaluation can proceed.

- For Speech-Only students, the Speech Pathologist can make the determination, but is free to consult with the School Psychologist if needed.

- The School Psychologist/Speech Pathologist's determination is documented in the Other Health Information box. Any other health concerns related to the referral can also be noted.


Referral
Related Information
Attachments

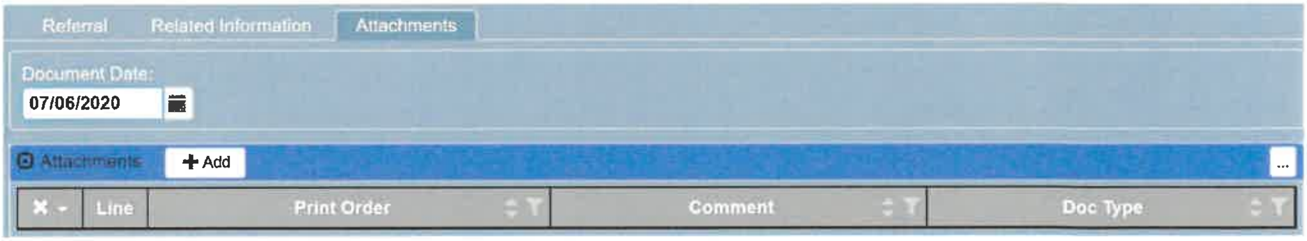
ATTACHMENTS

- ☐ PreReferral Intervention Strategies
- ☐ Tier III RTI form*
- ☐ Developmental Profile (Kindergarten), if available
- ☐ AIMS web progress monitoring Individual Report*
- ☐ Other

*required for all K-5 referrals for academic concerns

6. Related Information Accompanying Documents
   a. Intervention data is required for academic referrals for students K-5 (Reading, Writing, Math). Case Manager should check what documents are being included

C. Attachments Tab


Referral
Related Information
Attachments
Attachments
+ Add
...
Line
Print Order
Comment
Doc Type

Document Date: 07/06/2020

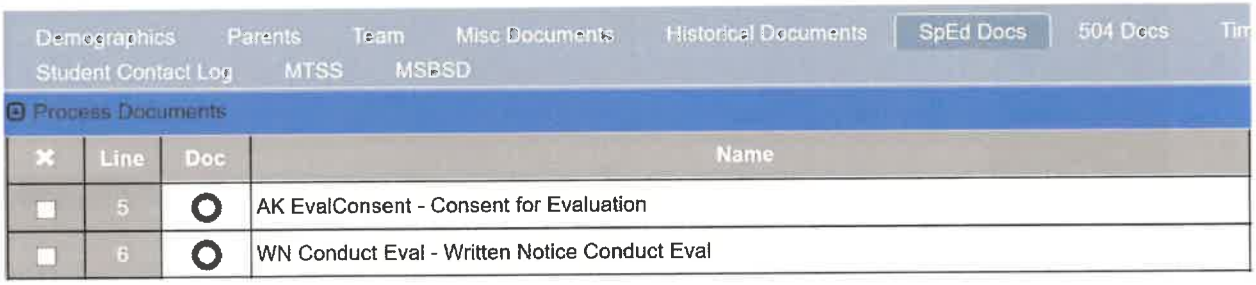
1. Document Date will carry over
2. Referral documents are uploaded here, using the +Add button (PDF preferred)
   a. Signed Consent to Evaluate
   b. Intervention data used for K-5 academic referrals

❖ Uploaded documents naming convention will be the following:

StudentInitials_NameofDocument_2digitMonth-2digitDay-2digitYear

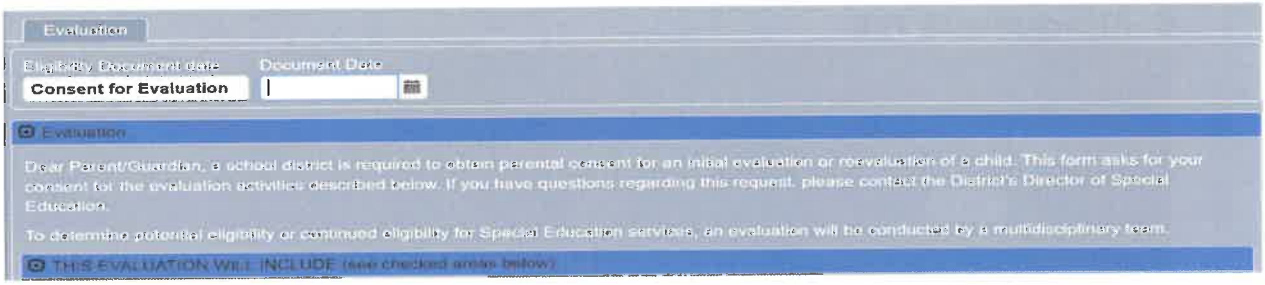
Examples: AB_VisionReport_02-06-20
AB_PtarmiganNeuro_12-12-19

2. Consent to Evaluate: Student SE Record>SpEd Docs tab>Process Documents



✖	Line	Doc	Name
☐	5	○	AK EvalConsent - Consent for Evaluation
☐	6	○	WN Conduct Eval - Written Notice Conduct Eval

A. Evaluation Tab



Eligibility Document date: Consent for Evaluation

Document Date:

Dear Parent/Guardian, a school district is required to obtain parental consent for an initial evaluation or reevaluation of a child. This form asks for your consent for the evaluation activities described below. If you have questions regarding this request, please contact the District's Director of Special Education.

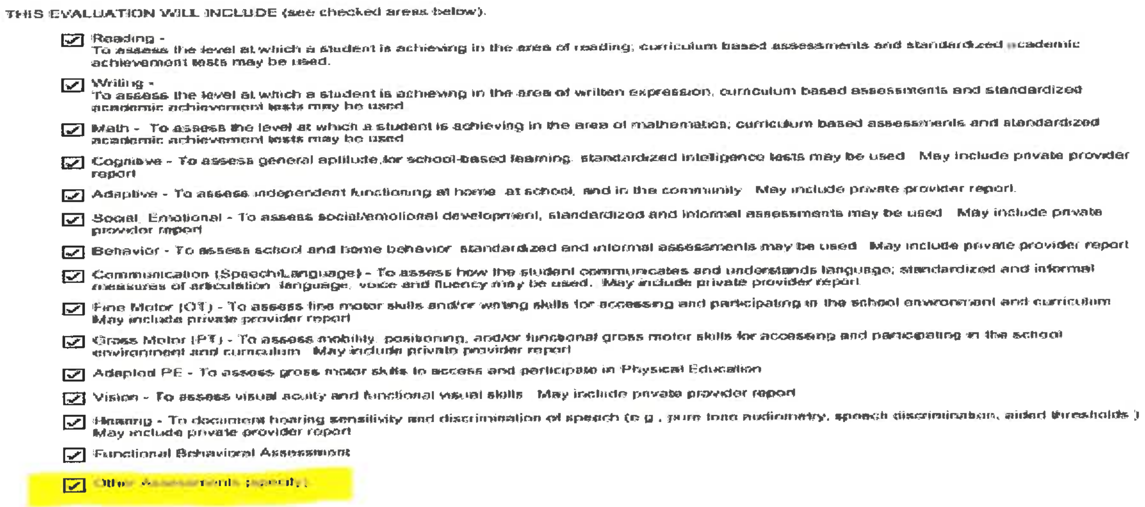
To determine potential eligibility or continued eligibility for Special Education services, an evaluation will be conducted by a multidisciplinary team.

1. Document Date must be entered (typically the date of the Eval Planning meeting, or the date Case Manager anticipated consent being signed)

◆ Evaluation planning meeting and/or Case Manager discussion with the School Psychologist, is best practice, prior to gaining Consent.

◆ If the student is in the custody of OCS/in Foster Placement, a Foster Affirmation form should be completed at the meeting. **OCS does not sign Consent to Evaluate.** Foster Parent(s) sign all Special Education paperwork as Parent.

◆ Related Service providers should be contacted to screen a student **before** adding their area to a Consent for Evaluation

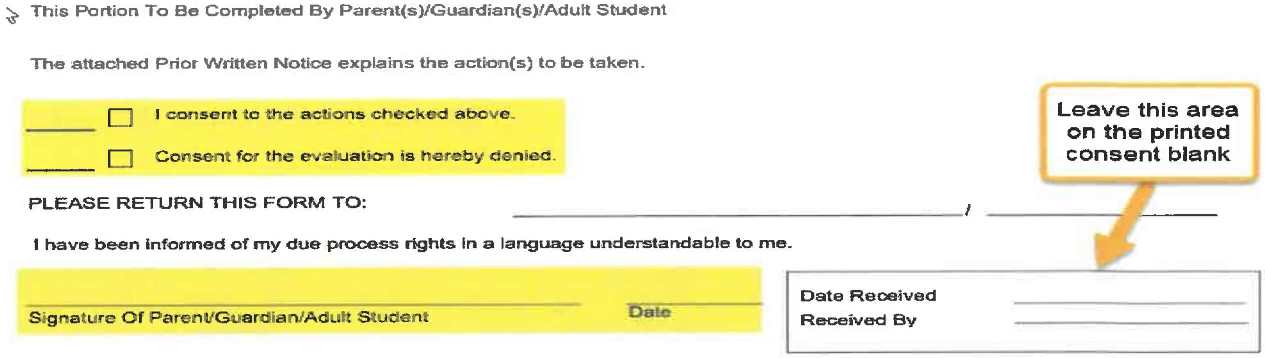

THIS EVALUATION WILL INCLUDE (see checked areas below).

- ☑ Reading - To assess the level at which a student is achieving in the area of reading; curriculum based assessments and standardized academic achievement tests may be used.
- ☑ Writing - To assess the level at which a student is achieving in the area of written expression, curriculum based assessments and standardized academic achievement tests may be used
- ☑ Math - To assess the level at which a student is achieving in the area of mathematics; curriculum based assessments and standardized academic achievement tests may be used
- ☑ Cognitive - To assess general aptitude for school-based learning. standardized intelligence tests may be used May include private provider report
- ☑ Adaptive - To assess independent functioning at home at school, and in the community May include private provider report.
- ☑ Social Emotional - To assess social/emotional development, standardized and informal assessments may be used May include private provider report
- ☑ Behavior - To assess school and home behavior standardized and informal assessments may be used May include private provider report
- ☑ Communication (Speech/Language) - To assess how the student communicates and understands language; standardized and informal measures of articulation language, voice and fluency may be used. May include private provider report
- ☑ Fine Motor (OT) - To assess fine motor skills and/or writing skills for accessing and participating in the school environment and curriculum May include private provider report
- ☑ Gross Motor (PT) - To assess mobility, positioning, and/or functional gross motor skills for accessing and participating in the school environment and curriculum May include private provider report
- ☑ Adapted PE - To assess gross motor skills to access and participate in Physical Education
- ☑ Vision - To assess visual acuity and functional visual skills May include private provider report
- ☑ Hearing - To document hearing sensitivity and discrimination of speech (e.g., pure tone audiometry, speech discrimination, aided thresholds) May include private provider report
- ☑ Functional Behavioral Assessment
- ☑ Other Assessments (specify)

2. All areas to be tested should be checked prior to Parent/Guardian signature
    a. Any areas added to, or information handwritten on the Consent **must be back-entered into the electronic consent form in Synergy SE**

- "Other" **cannot** be the only item checked on a Consent. All areas will populate in the Category dropdown in the ESER, and Synergy SE will seek an entry for each one.

3. Once complete, Print Preview the Consent to Evaluate and print for parent signature:



This Portion To Be Completed By Parent(s)/Guardian(s)/Adult Student

The attached Prior Written Notice explains the action(s) to be taken.

_____ ☐ I consent to the actions checked above.

_____ ☐ Consent for the evaluation is hereby denied.

PLEASE RETURN THIS FORM TO: ______________________ / ______________

I have been informed of my due process rights in a language understandable to me.

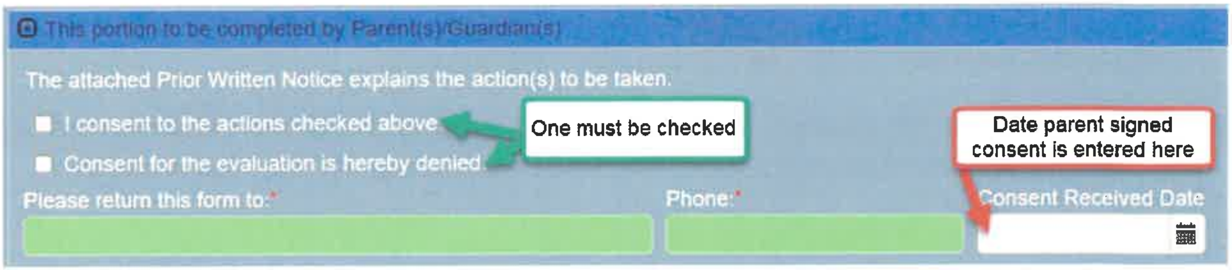
Signature Of Parent/Guardian/Adult Student ______________ Date ______

Date Received ______________

Received By ______________

Leave this area on the printed consent blank

- The items required on the form from Parent/Guardians are the Consent or Denial box, signature, and the date signed.



This portion to be completed by Parent(s)/Guardian(s)

The attached Prior Written Notice explains the action(s) to be taken.

☐ I consent to the actions checked above

☐ Consent for the evaluation is hereby denied

One must be checked

Date parent signed consent is entered here

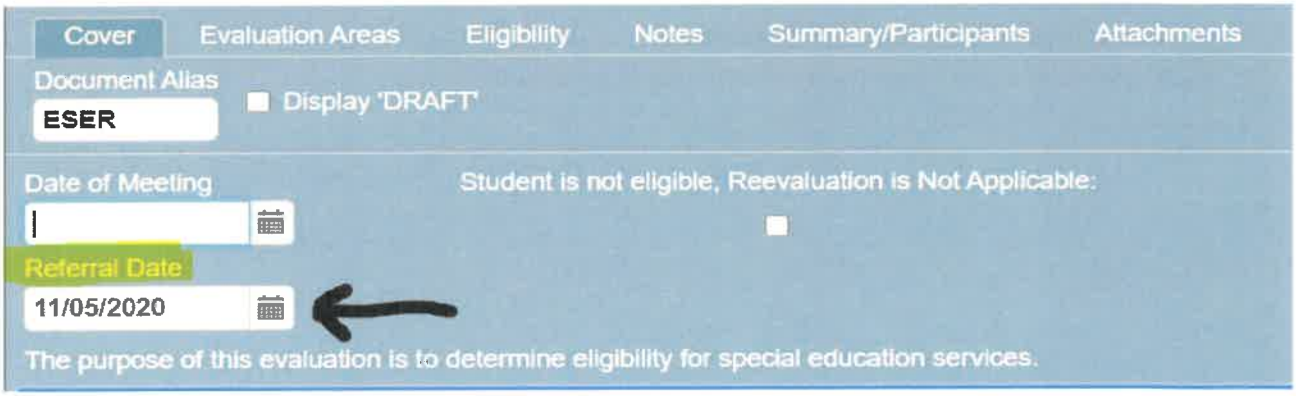
Please return this form to:*

Phone:*

Consent Received Date

1. Once Consent to Evaluate is signed, **information must be back-entered into the Synergy SE document**
   a. Check the Consent or Denial box, as indicated by parent/guardian
   b. Green boxes required; typically Case Manager name and phone number, but could be other staff (School Psychologist, Records Specialist) depending on school and situation
   c. Consent Received Date **must be entered in Synergy SE**
      i. Consent Received Date is the date Parent/Guardian signed the Consent

- Consent Received date is also entered into the Referral Date box on the Cover page of the ESER:



Document Alias: ESER

☐ Display 'DRAFT'

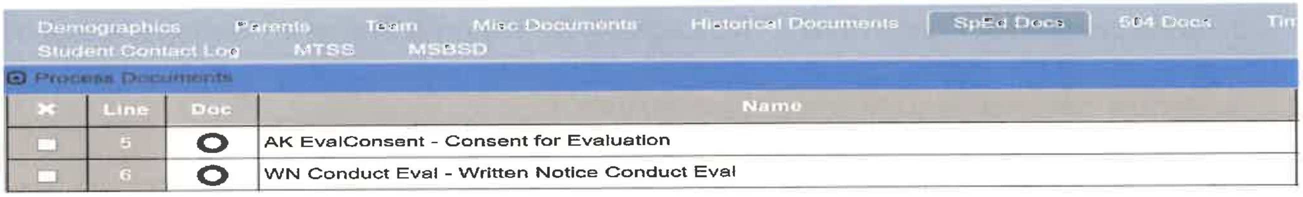
Date of Meeting:

Student is not eligible, Reevaluation is Not Applicable: ☐

Referral Date: 11/05/2020

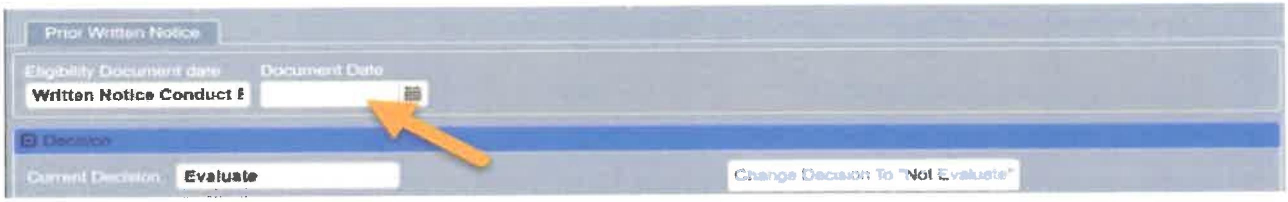
The purpose of this evaluation is to determine eligibility for special education services.

3. Written Notice to Conduct Evaluation: Student SE Record>SpEd Docs tab>Process Documents


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Tim
Student Contact Log
MTSS
MSBSD
Process Documents

✕	Line	Doc	Name
☐	5	○	AK EvalConsent - Consent for Evaluation
☐	6	○	WN Conduct Eval - Written Notice Conduct Eval

1. There are 2 Written Notices in the Initial and Reevaluation Process documents: the **WN Conduct Eval** is completed for the Referral packet

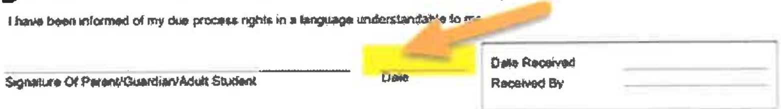

Prior Written Notice
Decision
Change Decision To "Not Evaluate"

Eligibility Document date: Written Notice Conduct E

Document Date:

Current Decision: Evaluate

1. Document date is required, and **must match the date Parent/Guardian signed the Consent to Evaluate (or gave verbal consent via phone, etc)**



I have been informed of my due process rights in a language understandable to me

Signature Of Parent/Guardian/Adult Student

Date

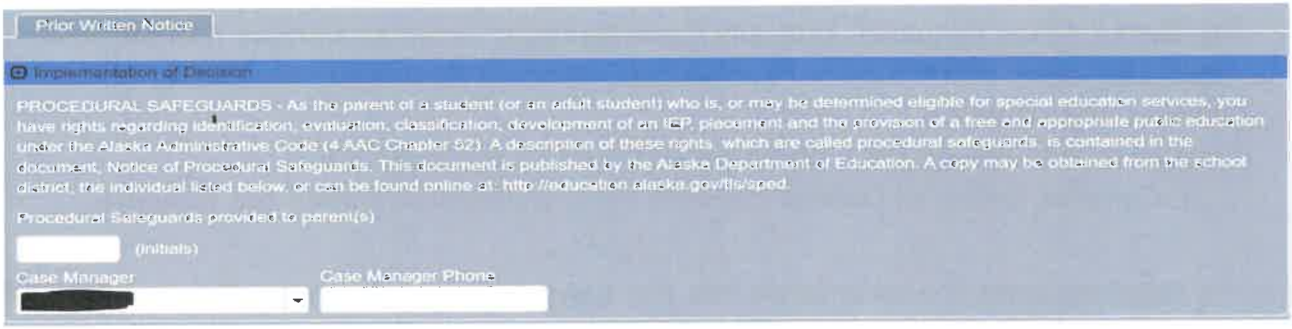
Date Received

Received By

Decision will always be "Evaluate". If a Consent is signed and the evaluation is halted, there will be specific documentation required, dependent on the reason why.

All 5 boxes of the Written Notice must be filled in:

- a. It is best practice to state the areas being evaluated in the Written Notice
- b."N/A" cannot be used. Can be "None", "None at this time", or some variation


Prior Written Notice
Implementation of Decision

PROCEDURAL SAFEGUARDS - As the parent of a student (or an adult student) who is, or may be determined eligible for special education services, you have rights regarding identification, evaluation, classification, development of an IEP, placement and the provision of a free and appropriate public education under the Alaska Administrative Code (4 AAC Chapter 52). A description of these rights, which are called procedural safeguards, is contained in the document, Notice of Procedural Safeguards. This document is published by the Alaska Department of Education. A copy may be obtained from the school district, the individual listed below, or can be found online at: http://education.alaska.gov/tls/sped.

Procedural Safeguards provided to parent(s)

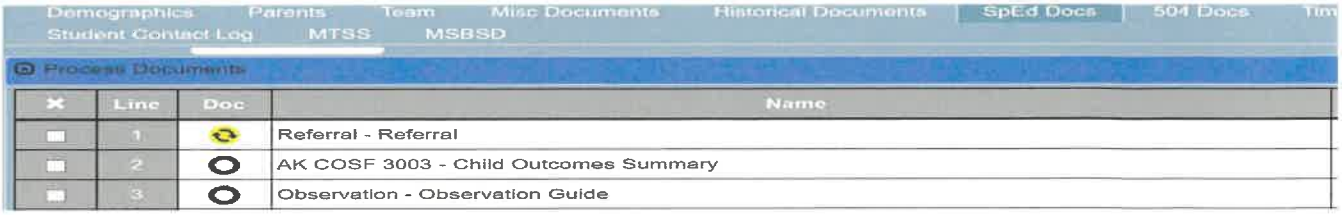
(initials)

Case Manager: [redacted]

Case Manager Phone:

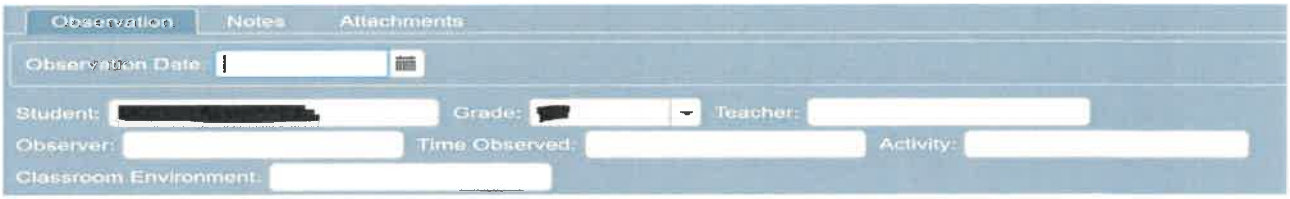
1. Case Manager enters his/her initials confirming Procedural Safeguards were provided/offered to Parent/Guardians
2. Case Manager chooses name from the dropdown
3. Case Manager enters a contact phone number

4. Observation Guide: Student SE Record>SpEd Docs tab>Process Documents


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Tim
Student Contact Log
MTSS
MSBSD
Process Documents

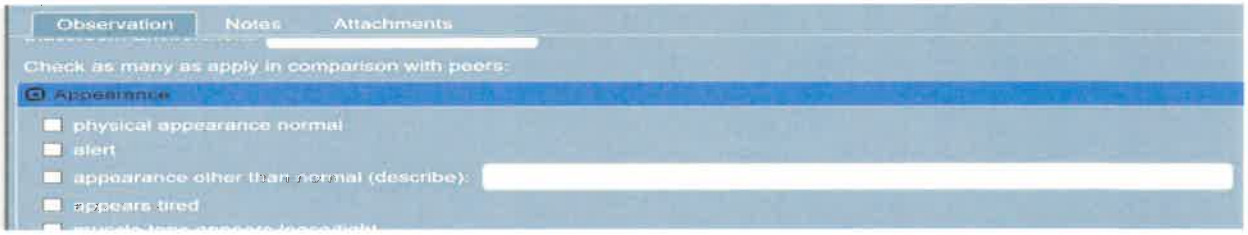
×	Line	Doc	Name
☐	1		Referral - Referral
☐	2	○	AK COSF 3003 - Child Outcomes Summary
☐	3	○	Observation - Observation Guide

A. Observation Tab


Observation
Notes
Attachments

Observation Date:
Student: [redacted]
Grade: [redacted]
Teacher:
Observer:
Time Observed:
Activity:
Classroom Environment:

1. Date the Observation was conducted must be entered
   a. **Initial Referrals:** Observation **cannot** be conducted until **after** Consent is signed
2. Student's name and grade will auto-populate
3. Teacher/staff instructing during observation entered (cannot be the observer)
4. Observer name must be entered (**cannot** be the gen ed teacher or aide/assistant)
   a. Typically Case Manager; can be Speech Path, School Psych, or related service provider, depending on areas being tested
5. Time observed, Activity observed, and Classroom Environment must be entered

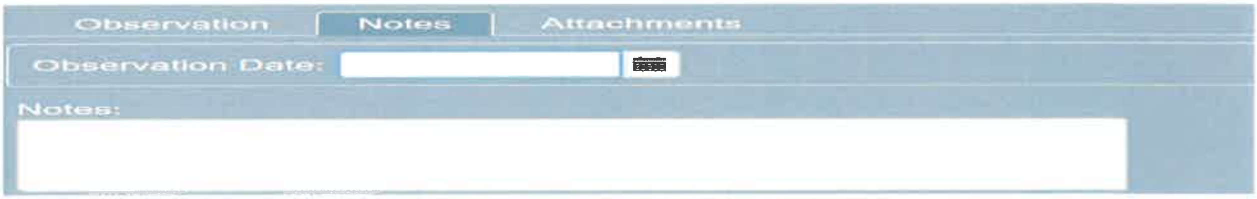

Observation
Notes
Attachments

Check as many as apply in comparison with peers:

Appearance
- ☐ physical appearance normal
- ☐ alert
- ☐ appearance other than normal (describe):
- ☐ appears tired

6. Any attributes observed within the categories should be checked, as applicable.

B. Notes Tab

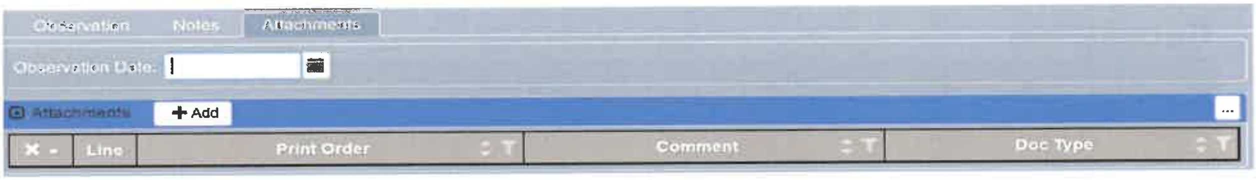

Observation
Notes
Attachments

Observation Date:

Notes:

1. Observation Date will carry over
2. Narrative notes from the observation will be entered here
   a. Notes are best practice, but not required

C. Attachments Tab


Observation
Notes
Attachments
Observation Date:
Attachments
+ Add
...
Line
Print Order
Comment
Doc Type

1. Observation Date would carry over
    2. Nothing is being uploaded here at this time

❖ To add/remove testing areas involving an Evaluation already in process:

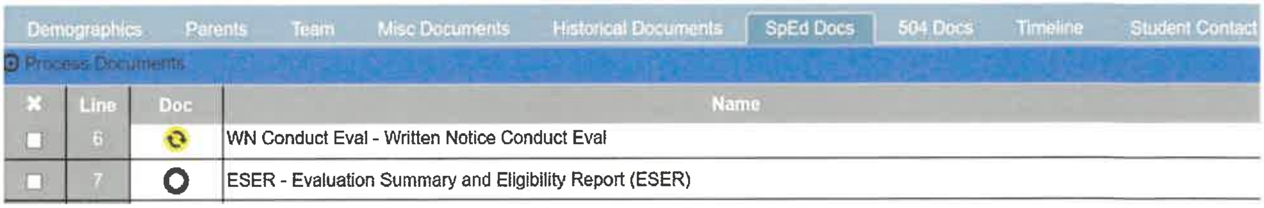
1. Case Manager will complete a second Consent to Evaluate, in the Misc Documents
2. Case Manager will write a corresponding Written Notice, in the Misc Documents, stating what changes are being made to the evaluation areas
3. Case Manager will add/remove the applicable testing areas in the Referral form
4. Case Manager gives documents to the Records Specialist to upload to the Attachments tab of the Referral form, review, and send in (Signed Consent, WN, and updated Referral form)
5. Records Technician unlocks the original AK EvalConsent in the Eval Process, updates the testing areas, and reFinalizes
6. Records Technician modifies the Compliance Coversheet on the Referral Packet, adds the new documents, and resends to the Team

Reviewing the Evaluation Summary Eligibility Report (ESER)

Initial Evaluations and 3 year Reevaluations

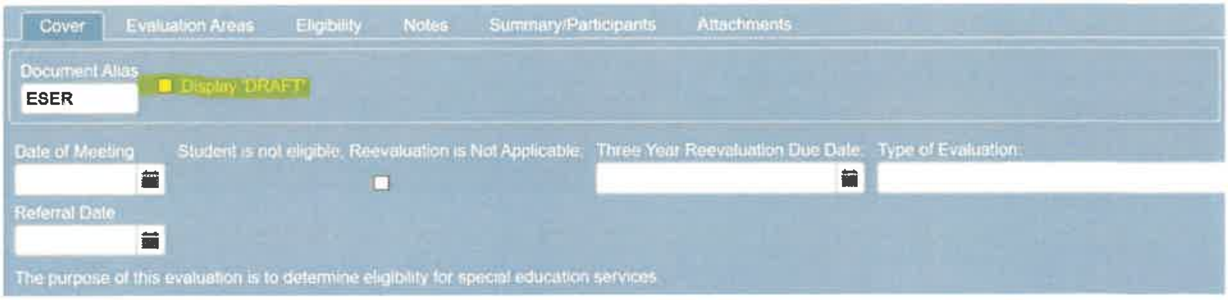
***Print Preview format is recommended for document review**

Student SE Record>SpEd Docs tab>Process Documents


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact
Process Documents

✖	Line	Doc	Name
☐	6		WN Conduct Eval - Written Notice Conduct Eval
☐	7	○	ESER - Evaluation Summary and Eligibility Report (ESER)

A. Cover Tab


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments

Document Alias: ESER

☐ Display 'DRAFT'

Date of Meeting:

Student is not eligible, Reevaluation is Not Applicable: ☐

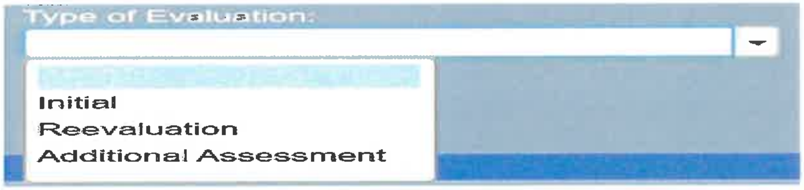
Three Year Reevaluation Due Date:

Type of Evaluation:

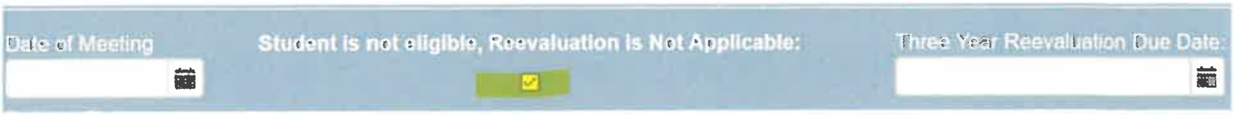
Referral Date:

The purpose of this evaluation is to determine eligibility for special education services

1. The Team may choose to check the "Display DRAFT" box until the meeting is held.
   ***The box must be unchecked in order for the ESER to Finalize**
2. Date of Meeting: remains blank until meeting is held
3. Referral Date must be entered (the date Parent signed the Consent to Evaluate)
4. Type of Evaluation must be chosen from the dropdown:


Type of Evaluation:
Initial
Reevaluation
Additional Assessment

5. Meeting Date/Reevaluation Due Date; **dates should relate as follows**:
   a. **Initial**: the Three Year Reeval Date is based on the date of the meeting: 3 years minus 1 day from the date of the meeting
   b. **Reevaluation**: the current compliance date should show in the Due Date box. The next Reeval date will be based on the date of the meeting, once it is held: 3 year minus 1 day from the date of the meeting
   c. **Additional Assessment**: the Reevaluation Due Date is not reset in relation to the meeting date. The date is to remain the existing 3-year Reeval date



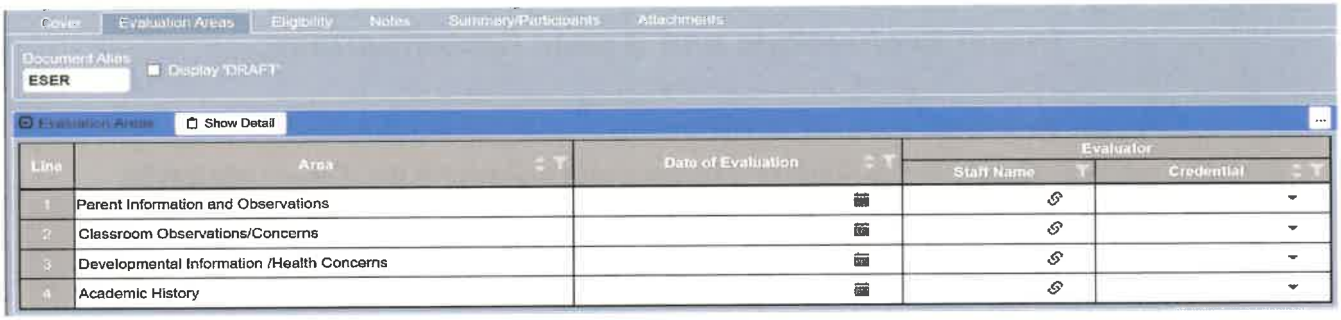
Date of Meeting:

Student is not eligible, Reevaluation is Not Applicable: ☑

Three Year Reevaluation Due Date:

6. **If the student does not qualify, the "Student is not eligible" box is checked.** This will clear the Reevaluation Due Date box and not flag future compliance

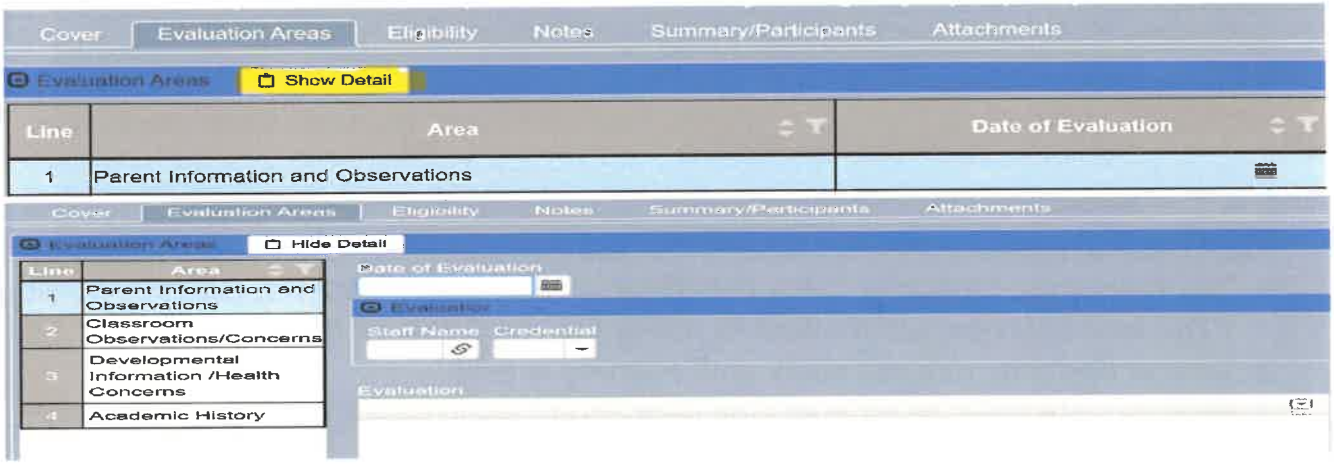
B. Evaluation Areas


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Display 'DRAFT'
Evaluation Areas
Show Detail
...

Document Alias
ESER

Line	Area	Date of Evaluation	Evaluator Staff Name	Credential
1	Parent Information and Observations			
2	Classroom Observations/Concerns			
3	Developmental Information /Health Concerns			
4	Academic History			

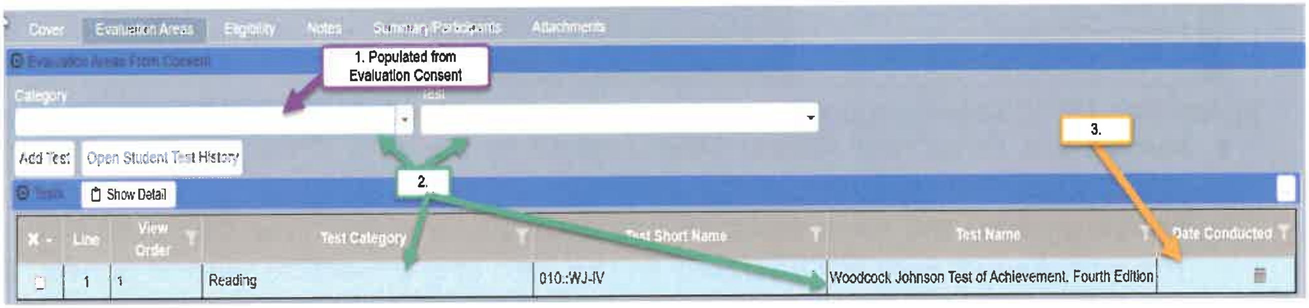
1. Case Manager completes Parent Information and Observations section (Required)
2. Case Manager completes Classroom Observation/Concerns section (Required)
3. Any Team member can enter Developmental Information/Health Concerns (Optional)
4. Any Team member can enter data in Academic History (Optional)


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Areas
Show Detail
Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Areas
Hide Detail
Date of Evaluation
Evaluation
Staff Name
Credential
Evaluation

Line	Area	Date of Evaluation
1	Parent Information and Observations	

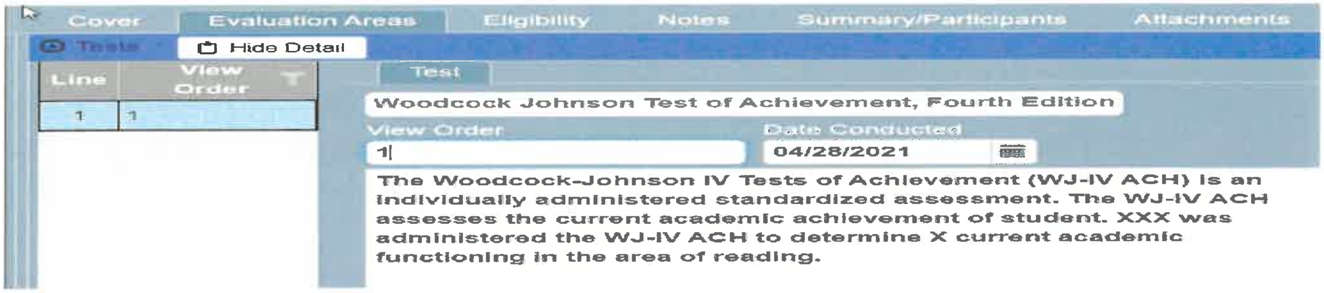
Line	Area
1	Parent Information and Observations
2	Classroom Observations/Concerns
3	Developmental Information /Health Concerns
4	Academic History

1. Narrative data and information is entered in each section by clicking the numbered line to turn it blue, then clicking Show Detail


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Areas From Consent
1. Populated from Evaluation Consent
Category
Test
Add Test
Open Student Test History
2.
3.
Tests
Show Detail

☐	Line	View Order	Test Category	Test Short Name	Test Name	Date Conducted
☐	1	1	Reading	010.:WJ-IV	Woodcock Johnson Test of Achievement. Fourth Edition	

1. Category dropdown options auto-populate from the Consent to Evaluate
2. Each Evaluator is responsible for adding their Category and Test by choosing from the dropdowns and clicking the Add Test button
3. Each Evaluator is responsible for entering the date the evaluation was done in the Date Conducted box.


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Tests
Hide Detail
Line
View Order
Test
View Order
Date Conducted

Line	View Order
1	1

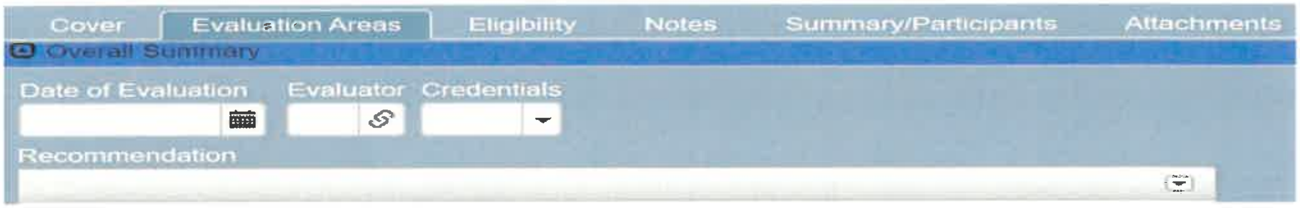
Woodcock Johnson Test of Achievement, Fourth Edition

View Order: 1

Date Conducted: 04/28/2021

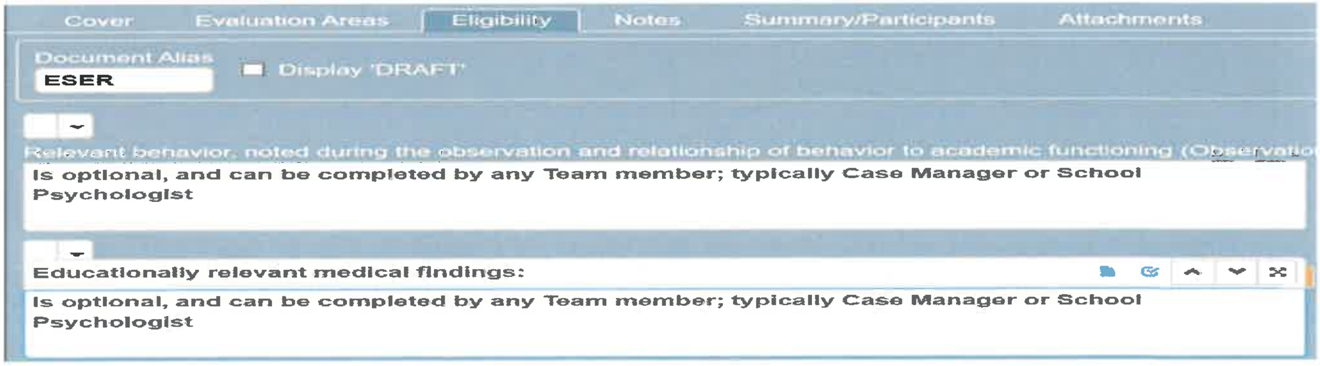
The Woodcock-Johnson IV Tests of Achievement (WJ-IV ACH) is an individually administered standardized assessment. The WJ-IV ACH assesses the current academic achievement of student. XXX was administered the WJ-IV ACH to determine X current academic functioning in the area of reading.

1. Assessment results are entered by clicking the numbered line to turn it blue, then clicking Show Detail


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Overall Summary
Date of Evaluation
Evaluator
Credentials
Recommendation

1. The Overall Summary is typically completed by the School Psychologist, or Speech/Language Pathologist if student is Speech-Only
2. Date, Evaluator Name, Credentials, and the recommendation is entered

C. Eligibility


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Document Alias
Display 'DRAFT'
Relevant behavior, noted during the observation and relationship of behavior to academic functioning (Observatio

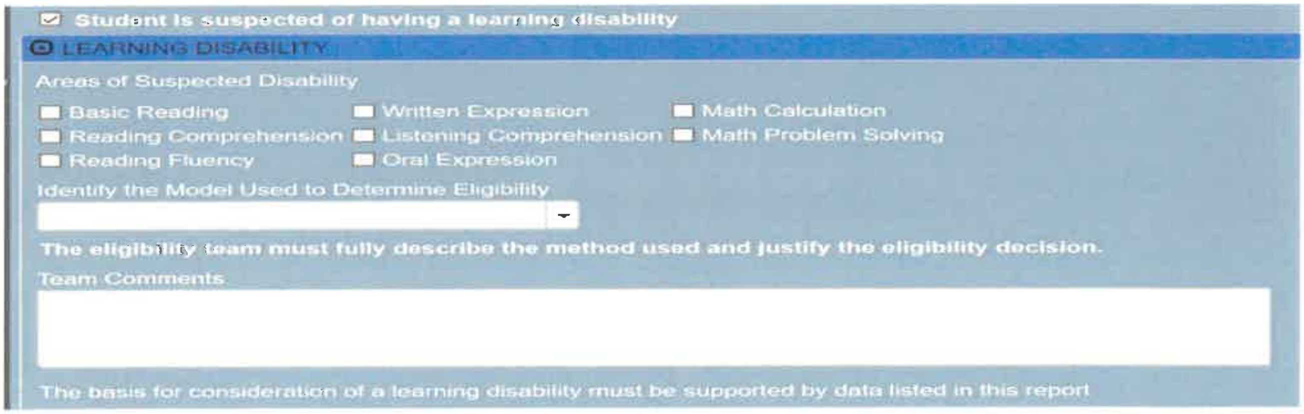
Document Alias: ESER

☐ Display 'DRAFT'

Is optional, and can be completed by any Team member; typically Case Manager or School Psychologist

Educationally relevant medical findings:

Is optional, and can be completed by any Team member; typically Case Manager or School Psychologist


LEARNING DISABILITY
Areas of Suspected Disability
Identify the Model Used to Determine Eligibility
Team Comments

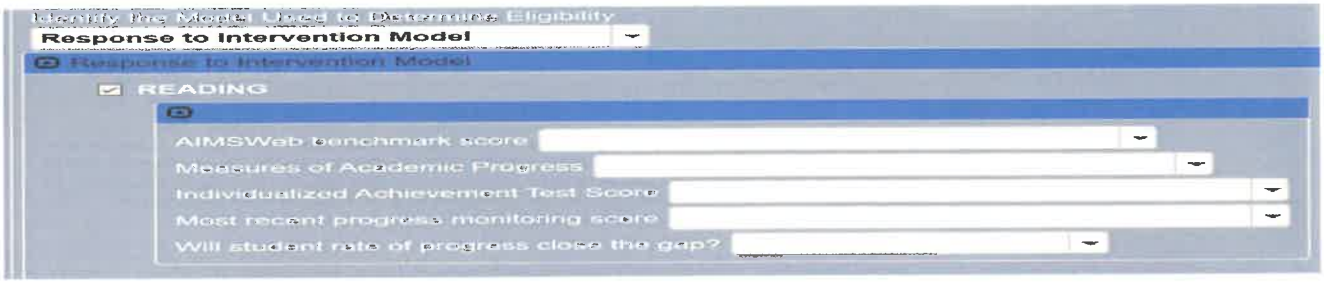
☑ Student is suspected of having a learning disability

☐ Basic Reading
☐ Reading Comprehension
☐ Reading Fluency
☐ Written Expression
☐ Listening Comprehension
☐ Oral Expression
☐ Math Calculation
☐ Math Problem Solving

The eligibility team must fully describe the method used and justify the eligibility decision.

The basis for consideration of a learning disability must be supported by data listed in this report

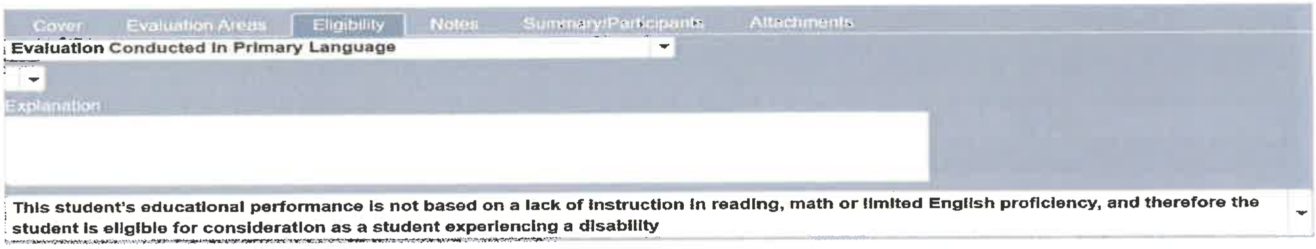
1. "Suspected Learning Disability" box will be checked and this area completed by School Psychologist if student was evaluated in Academic areas
   a. Any Areas of Suspected Disability would be checked
   b. Model Used will be identified from the dropdown
   c. Team Comments box is optional



Identify The Model Used to Determine Eligibility
Response to Intervention Model

Response to Intervention Model
☑ READING
AIMSWeb benchmark score
Measures of Academic Progress
Individualized Achievement Test Score
Most recent progress monitoring score
Will student rate of progress close the gap?

1. If Response to Intervention is chosen, check boxes for Reading, Writing, and Math open
   b. School Psychologist will check areas as appropriate, and complete the dropdowns

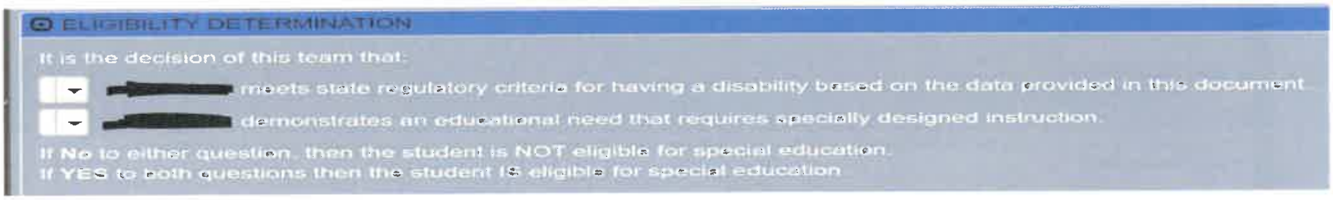


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Explanation

Evaluation Conducted In Primary Language

This student's educational performance is not based on a lack of instruction in reading, math or limited English proficiency, and therefore the student is eligible for consideration as a student experiencing a disability

1. One option must be picked from the "Primary Language" dropdown
   a. If the evaluation was not conducted in the student's primary language, an Explanation must be entered
2. One option must be picked from the "Educational Performance" dropdown



ELIGIBILITY DETERMINATION

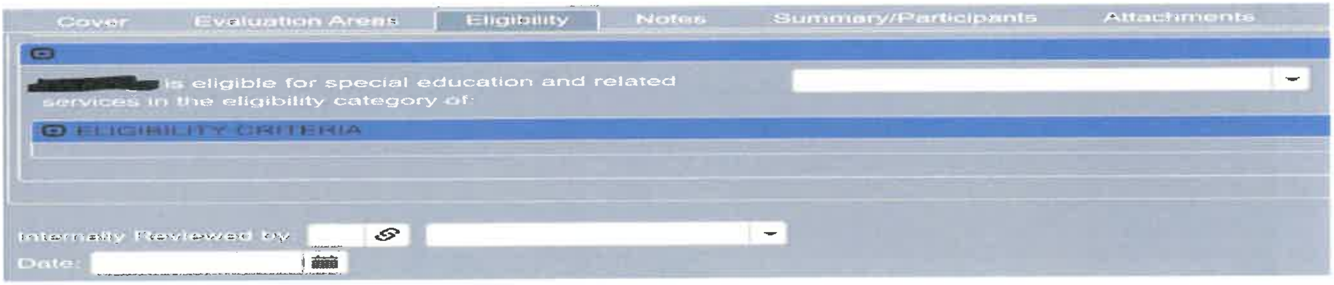
It is the decision of this team that:

[redacted] meets state regulatory criteria for having a disability based on the data provided in this document.

[redacted] demonstrates an educational need that requires specially designed instruction.

If No to either question, then the student is NOT eligible for special education.
If YES to both questions then the student IS eligible for special education

1. School Psychologist will recommend eligibility by choosing Yes or No from the 2 dropdowns. Both must be completed, and both must be Yes for student to qualify



Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments

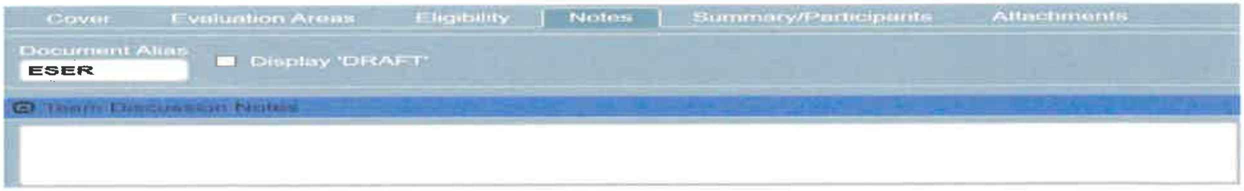
[redacted] is eligible for special education and related services in the eligibility category of:

ELIGIBILITY CRITERIA

Internally Reviewed by
Date:

1. If student qualifies, School Psychologist will choose an Eligibility Category in the box to the right
   a. An explanation of the Category criteria will auto-populate into the document
2. School Psychologist will enter his/her name, pick professional credentials from the dropdown, and enter the review date (or SLP if Speech Only).
   a. For **ALL** Additional Assessments: The School Psychologist assigned to the school site reviews and signs off on the ESER
3. School Psychologist, or Speech Path if student is speech only, will print this page to sign, date, and give to Case Manager.

D. Notes

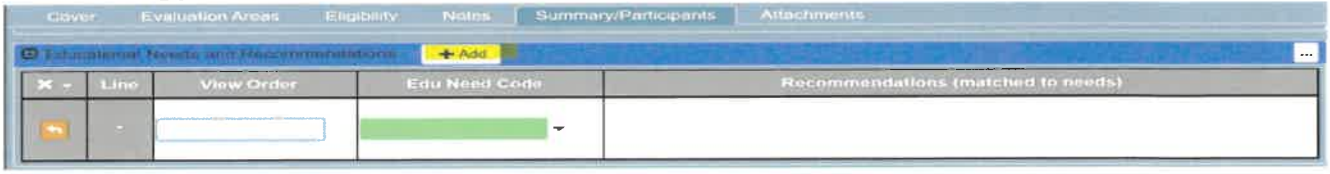

Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Team Discussion Notes

Document Alias: ESER

☐ Display 'DRAFT'

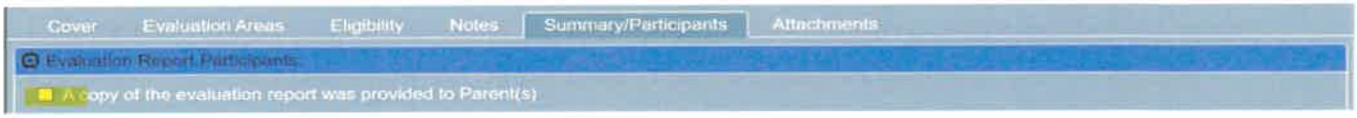
1. Eligibility Determination meeting notes must be typed (handwritten notes are returned to the Case Manager for the working file)

E. Summary/Participants (this page generates the signature page for the ESER meeting)


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Educational Needs and Recommendations
+ Add
...

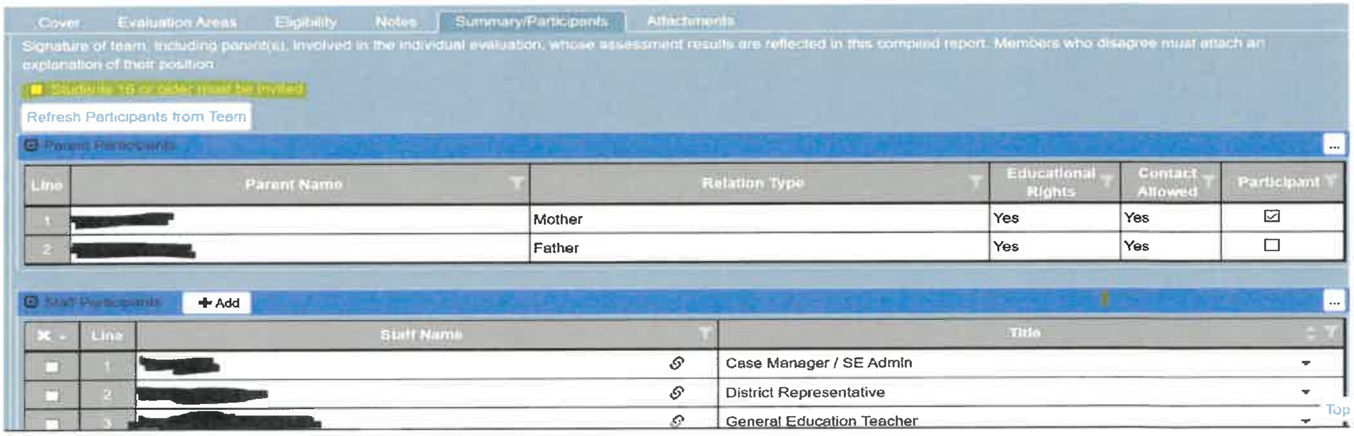
✖	Line	View Order	Edu Need Code	Recommendations (matched to needs)
	-			

1. Each evaluator will put their area into the grid as an Educational Need by using the +Add button, if the student qualifies in that area
2. Each evaluator must also write a Recommendation to match the Need


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Report Participants

☐ A copy of the evaluation report was provided to Parent(s)

1. The box indicating a copy of the report was provided to Parents/Guardians must be checked
   a. ESER is not available in ParentVUE; copy will be sent home by the Records Specialist


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Refresh Participants from Team
Parent Participants
...
Staff Participants
+ Add
...
Top

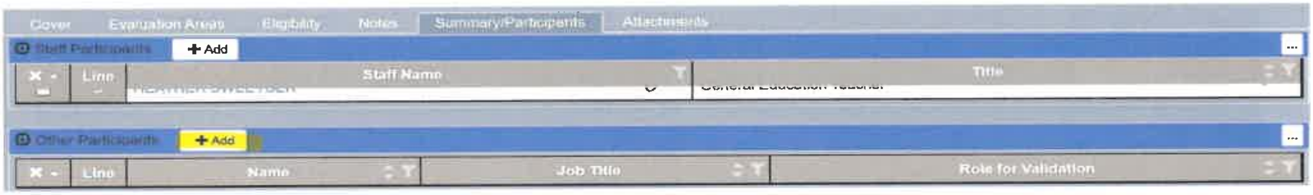
Signature of team, including parent(s), involved in the individual evaluation, whose assessment results are reflected in this compiled report. Members who disagree must attach an explanation of their position

☐ Students 16 or older must be invited

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	[redacted]	Mother	Yes	Yes	☑
2	[redacted]	Father	Yes	Yes	☐

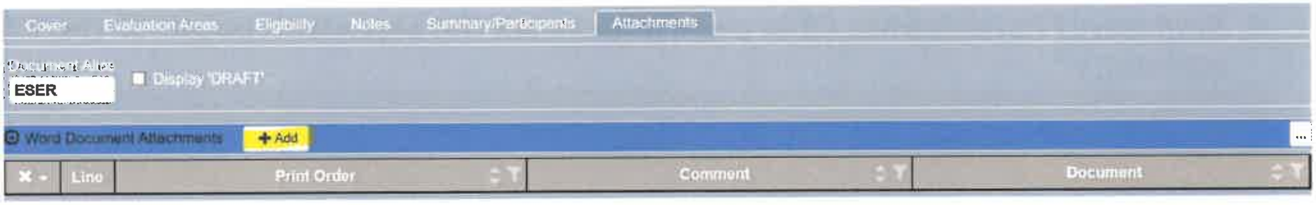
✖	Line	Staff Name	Title
☐	1	[redacted]	Case Manager / SE Admin
☐	2	[redacted]	District Representative
☐	3	[redacted]	General Education Teacher

1. Students 16 years of age or older must be invited to the meeting, box must be checked
2. Parents/Guardians names will auto-populate from the Student Information System "Participant" box must be checked for Parent/Guardan signature line to generate
3. Staff Names and Title/Role at the meeting must be entered and clearly indicated (gridlines can be added by using the +Add button)
   a. Typically a meeting requires 3 primary roles: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
   b. This means **a minimum of 3 persons**. One person cannot fill more than one primary role a meeting (for example, Case Manager cannot also be the District Rep)
   c. For students attending Mat-Su Day School, Mat-Su Secondary, or *Preschool a General Ed Teacher is not required (*unless the meeting is Kindergarten transition)


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Staff Participants
+ Add
Line
Staff Name
Title
Other Participants
+ Add
Line
Name
Job Title
Role for Validation

1. Attendees from an agency, or any other outside participants, can also be added here

F. Attachments


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Word Document Attachments
+ Add
Line
Print Order
Comment
Document

Document Alias: ESER

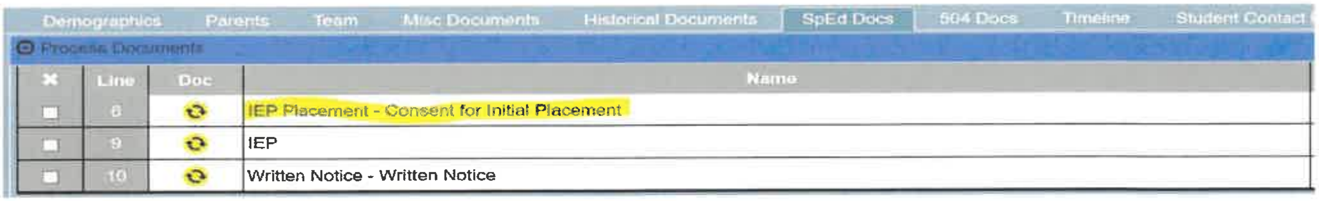
☐ Display 'DRAFT'

1. Original signature pages pertaining to the Eligibility meeting are uploaded and attached here, using the +Add button (PDF versions are preferred)
   a. The eligibility page signed by the School Psych (Or Speech Path if speech only)
   b. The ESER meeting team signature

- If an **Initial Evaluation** for a student, the Consent for Initial Placement must be signed by the Parent/Guardian before an IEP can be implemented

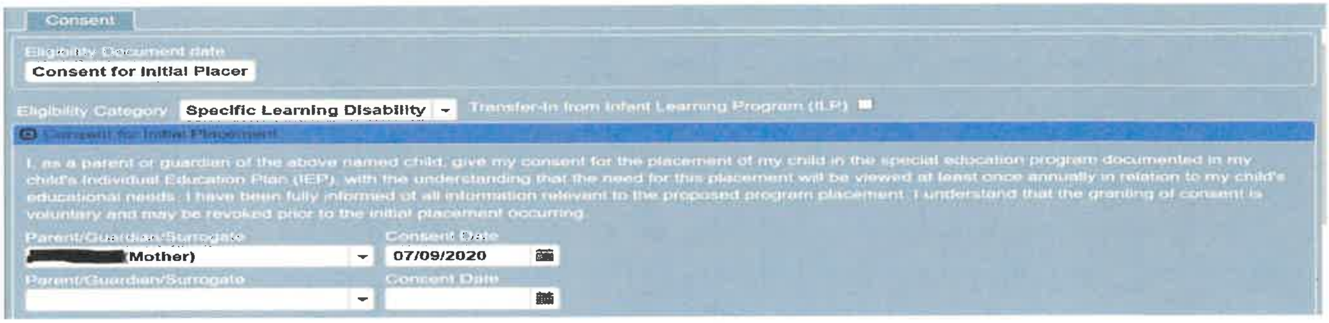
- If an **Initial Evaluation** for a Preschool age student, the Child Outcome Summary Entry form must be completed by the Case Manager

❖ Consent for Initial Placement



✖	Line	Doc	Name
☐	8	⟳	IEP Placement - Consent for Initial Placement
☐	9	⟳	IEP
☐	10	⟳	Written Notice - Written Notice

1. If an **Initial Evaluation** for a student, the Consent for Initial Placement must be signed by the Parent/Guardian before an IEP can be implemented



Eligibility Document date: Consent for Initial Placer

Eligibility Category: Specific Learning Disability

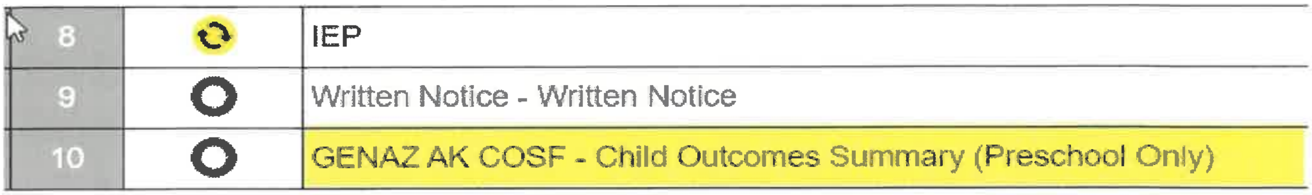
Transfer-In from Infant Learning Program (ILP) ☐

I, as a parent or guardian of the above named child, give my consent for the placement of my child in the special education program documented in my child's Individual Education Plan (IEP), with the understanding that the need for this placement will be viewed at least once annually in relation to my child's educational needs. I have been fully informed of all information relevant to the proposed program placement. I understand that the granting of consent is voluntary and may be revoked prior to the initial placement occurring.

Parent/Guardian/Surrogate	Consent Date
[redacted](Mother)	07/09/2020

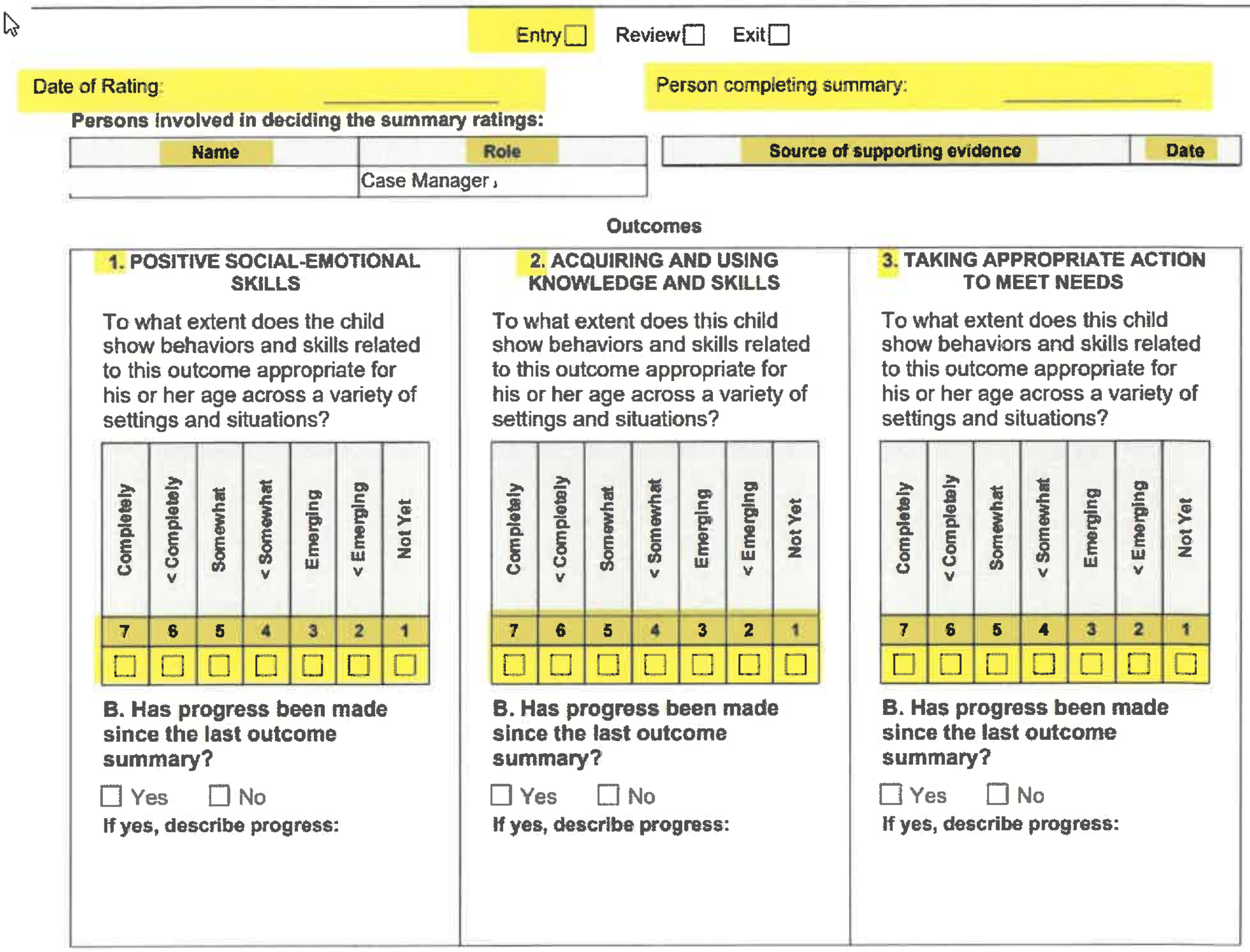
1. Invited Parent(s)/Guardian(s) must be identified in the dropdown
2. Date of Consent is entered (typically the date of the meeting)
3. Document is printed and signed/dated by Parent(s)/Guardian(s)
    a. If Parent/Guardian attends the meeting via phone, IEP can be drafted, but **services cannot be provided until the Initial Placement Consent is signed**
    b. The Team may hold the ESER meeting without the Parent/Guardian to meet compliance, if every effort was made to engage and schedule with no response
    c. If the Parent/Guardian does not participate in the ESER meeting, the process stops. **The IEP cannot be completed and implemented until Initial Placement Consent is signed**
4. Signed Consent for Initial Placement is uploaded:
    a. To the Attached Documents grid under the Historical Document's tab
    b. To the Attached Documents grid under the SpEd Docs tab

❖ Child Outcomes Summary Entry



8	↻	IEP
9	○	Written Notice - Written Notice
10	○	GENAZ AK COSF - Child Outcomes Summary (Preschool Only)

1. If this is an **Initial for an incoming Preschool child**, a Child Outcomes Summary Entry must be completed by the Case Manager



Entry☐ Review☐ Exit☐

Date of Rating: ____________

Person completing summary: ____________

Persons involved in deciding the summary ratings:

Name	Role
	Case Manager

Source of supporting evidence	Date

Outcomes

1. POSITIVE SOCIAL-EMOTIONAL SKILLS

To what extent does the child show behaviors and skills related to this outcome appropriate for his or her age across a variety of settings and situations?

Completely	< Completely	Somewhat	< Somewhat	Emerging	< Emerging	Not Yet
7	6	5	4	3	2	1
☐	☐	☐	☐	☐	☐	☐

B. Has progress been made since the last outcome summary?

☐ Yes ☐ No

If yes, describe progress:

2. ACQUIRING AND USING KNOWLEDGE AND SKILLS

To what extent does this child show behaviors and skills related to this outcome appropriate for his or her age across a variety of settings and situations?

Completely	< Completely	Somewhat	< Somewhat	Emerging	< Emerging	Not Yet
7	6	5	4	3	2	1
☐	☐	☐	☐	☐	☐	☐

B. Has progress been made since the last outcome summary?

☐ Yes ☐ No

If yes, describe progress:

3. TAKING APPROPRIATE ACTION TO MEET NEEDS

To what extent does this child show behaviors and skills related to this outcome appropriate for his or her age across a variety of settings and situations?

Completely	< Completely	Somewhat	< Somewhat	Emerging	< Emerging	Not Yet
7	6	5	4	3	2	1
☐	☐	☐	☐	☐	☐	☐

B. Has progress been made since the last outcome summary?

☐ Yes ☐ No

If yes, describe progress:

1. Entry box must be checked at the top
2. Date of Rating and Person completing the Summary is entered
3. Persons involved in deciding ratings should be identified
4. Source of supporting evidence is referenced (i.e. ILP documents, ESER results, etc)
5. Each area requires an entry rating of 1-7
6. Document is Finalized once completed

❖ Areas below the ratings will remain blank until the COS Exit Form is needed:

a. If student is evaluated and no longer eligible during Preschool
b. When student transitions from PreK to Kindergarten

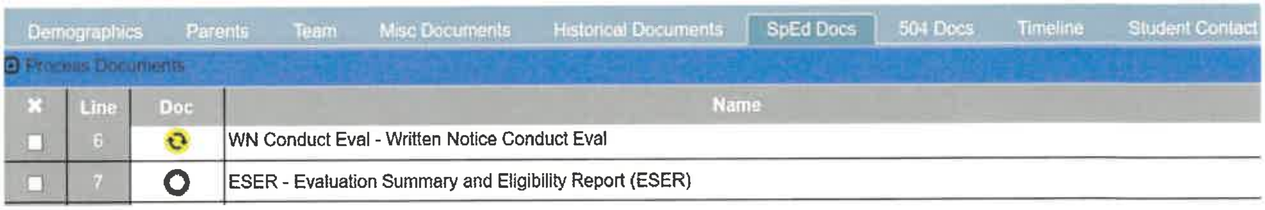
7/13/21

Reviewing the Evaluation Summary Eligibility Report (ESER)

Additional Assessments

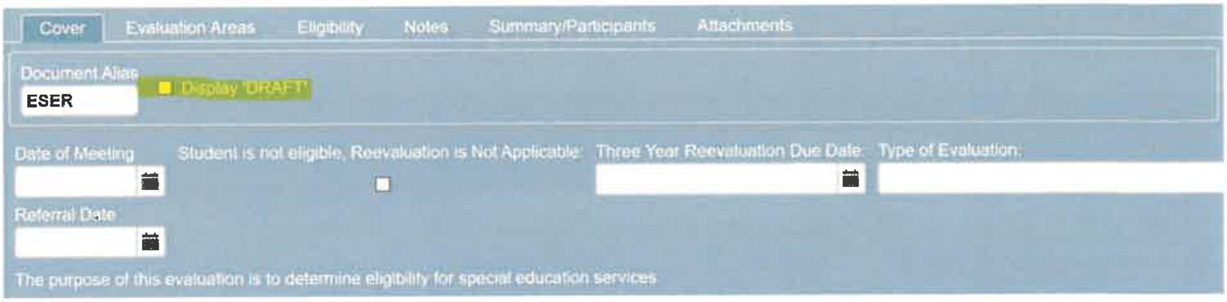
***Print Preview format is recommended for document review**

Student SE Record>SpEd Docs tab>Process Documents


Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact
Process Documents

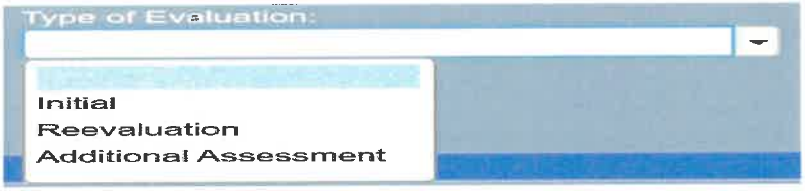
✖	Line	Doc	Name
☐	6		WN Conduct Eval - Written Notice Conduct Eval
☐	7	○	ESER - Evaluation Summary and Eligibility Report (ESER)

A. Cover Tab


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Display 'DRAFT'
Date of Meeting
Student is not eligible, Reevaluation is Not Applicable
Three Year Reevaluation Due Date
Type of Evaluation:
Referral Date
The purpose of this evaluation is to determine eligibility for special education services

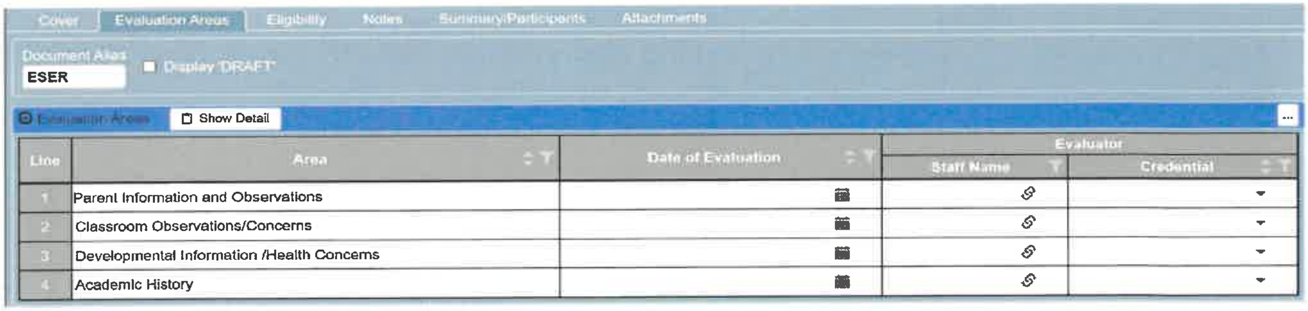
Document Alias: ESER

1. The Team may choose to check the "Display DRAFT" box until the meeting is held. ***The box must be unchecked in order for the ESER to Finalize**
2. Date of Meeting: remains blank until meeting is held
3. Referral Date must be entered (the date Parent signed the Consent to Evaluate)
4. Type of Evaluation (Additional Assessment) must be chosen from the dropdown:


Type of Evaluation:
Initial
Reevaluation
Additional Assessment

5. Meeting Date/Reevaluation Due Date; **date should relate as follows**:
   a. **Additional Assessment**: the Reevaluation Due Date is not reset in relation to the meeting date. The date will remain the existing 3-year Reeval date

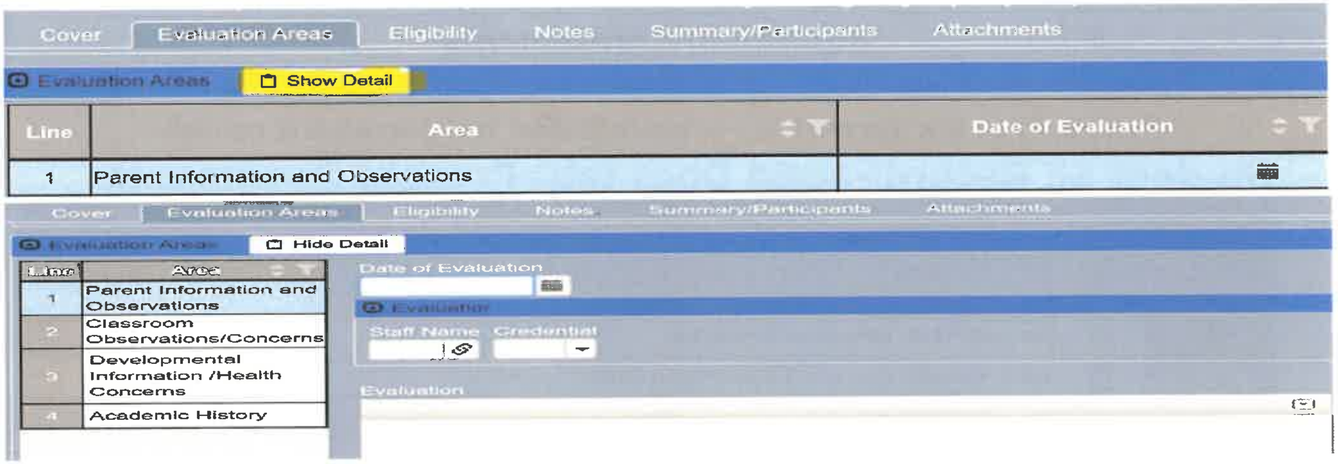
B. Evaluation Areas


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Display 'DRAFT'
Evaluation Areas
Show Detail

Document Alias: ESER

Line	Area	Date of Evaluation	Evaluator	
			Staff Name	Credential
1	Parent Information and Observations			
2	Classroom Observations/Concerns			
3	Developmental Information /Health Concerns			
4	Academic History			

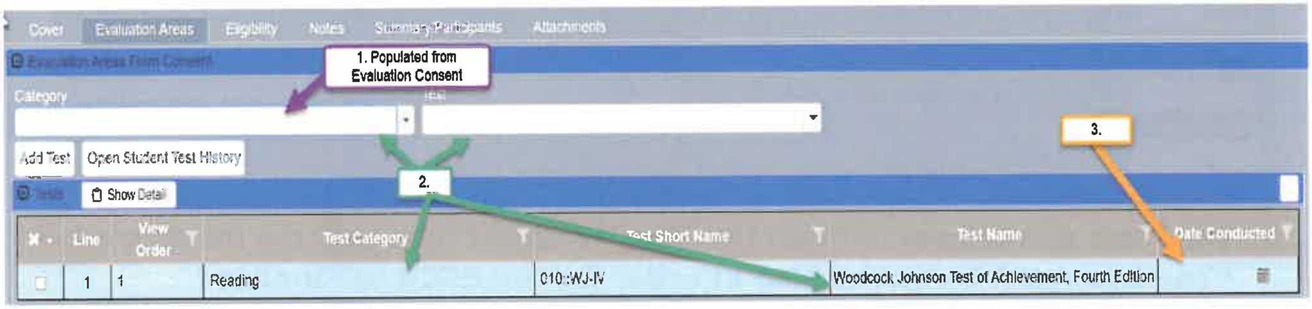
1. Case Manager completes Parent Information and Observations section (Required)
2. Case Manager completes Classroom Observation/Concerns section (Required)
3. Any Team member can enter Developmental Information/Health Concerns (Optional)
4. Any Team member can enter data in Academic History (Optional)


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Areas
Show Detail
Hide Detail
Date of Evaluation
Evaluation
Staff Name
Credential
Evaluation

Line	Area	Date of Evaluation
1	Parent Information and Observations	

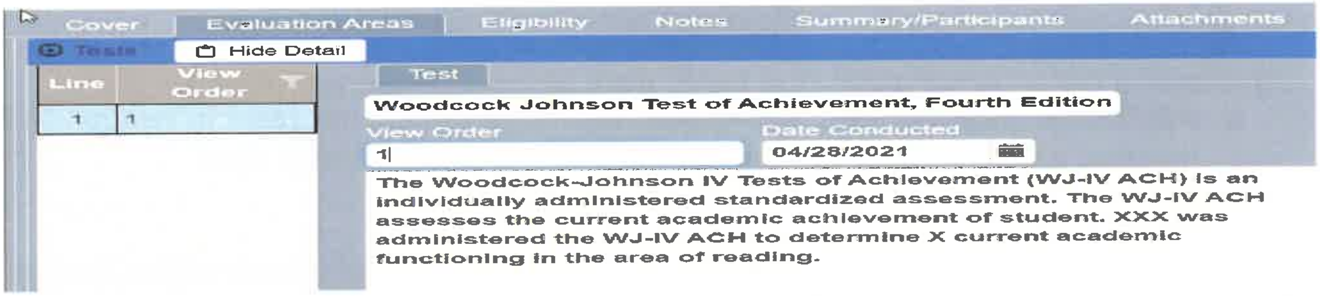
Line	Area
1	Parent Information and Observations
2	Classroom Observations/Concerns
3	Developmental Information /Health Concerns
4	Academic History

1. Narrative data and information is entered in each section by clicking the numbered line to turn it blue, then clicking Show Detail


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Areas From Consent
1. Populated from Evaluation Consent
Category
Test
Add Test
Open Student Test History
Tests
Show Detail
2.
3.

Line	View Order	Test Category	Test Short Name	Test Name	Date Conducted
1	1	Reading	010::WJ-IV	Woodcock Johnson Test of Achievement, Fourth Edition	

1. Category dropdown options auto-populate from the Consent to Evaluate
2. Each Evaluator is responsible for adding their Category and Test by choosing from the dropdowns and clicking the Add Test button
3. Each Evaluator is responsible for entering the date the evaluation was done in the Date Conducted box.


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Tests
Hide Detail
Line
View Order
Test

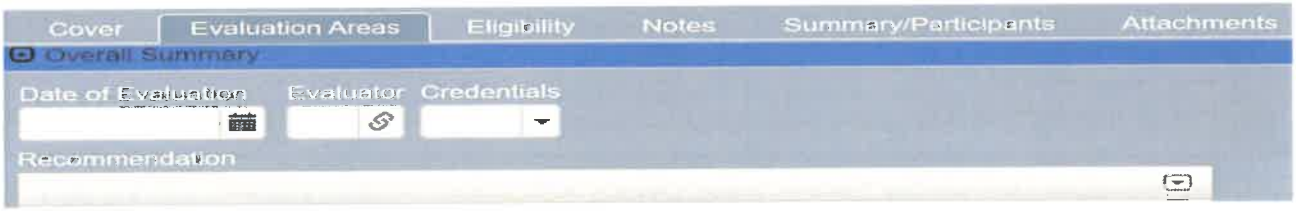
Woodcock Johnson Test of Achievement, Fourth Edition

View Order: 1

Date Conducted: 04/28/2021

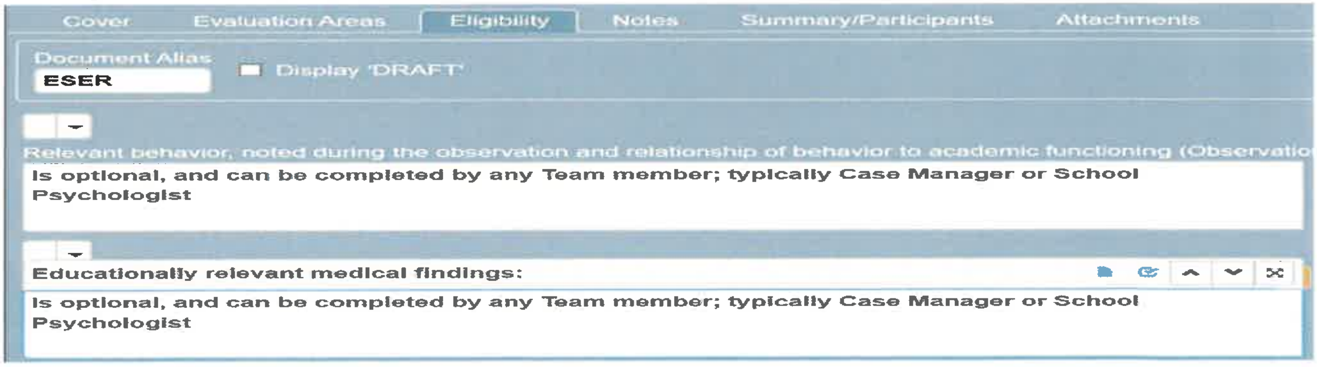
The Woodcock-Johnson IV Tests of Achievement (WJ-IV ACH) is an individually administered standardized assessment. The WJ-IV ACH assesses the current academic achievement of student. XXX was administered the WJ-IV ACH to determine X current academic functioning in the area of reading.

1. Assessment results are entered by clicking the numbered line to turn it blue, then clicking Show Detail


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Overall Summary
Date of Evaluation
Evaluator
Credentials
Recommendation

1. The Overall Summary is typically completed by the School Psychologist, or Speech/Language Pathologist if student is Speech-Only
2. Date, Evaluator Name, Credentials, and the recommendation is entered

C. Eligibility



Document Alias: ESER

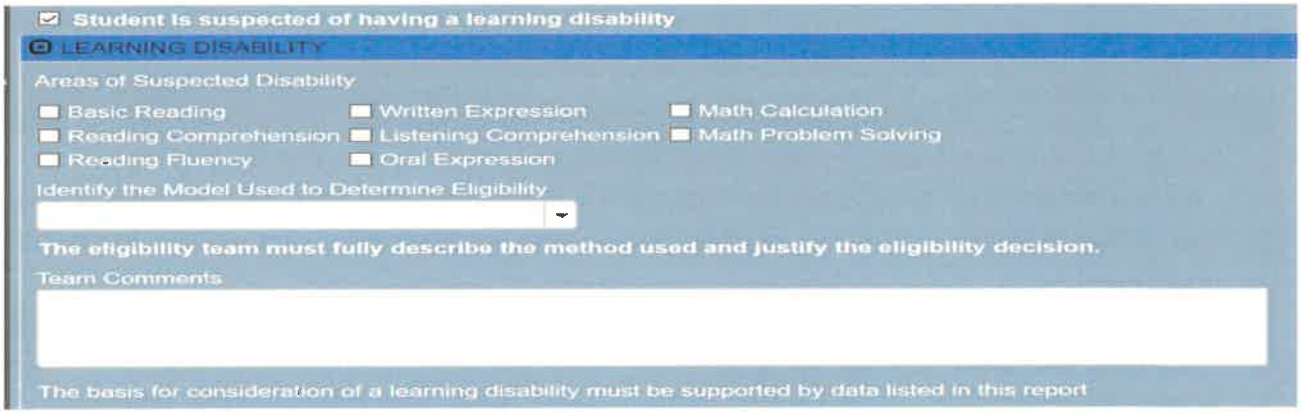
☐ Display 'DRAFT'

Relevant behavior, noted during the observation and relationship of behavior to academic functioning (Observatio

Is optional, and can be completed by any Team member; typically Case Manager or School Psychologist

Educationally relevant medical findings:

Is optional, and can be completed by any Team member; typically Case Manager or School Psychologist



☑ Student is suspected of having a learning disability

LEARNING DISABILITY

Areas of Suspected Disability

☐ Basic Reading ☐ Written Expression ☐ Math Calculation
☐ Reading Comprehension ☐ Listening Comprehension ☐ Math Problem Solving
☐ Reading Fluency ☐ Oral Expression

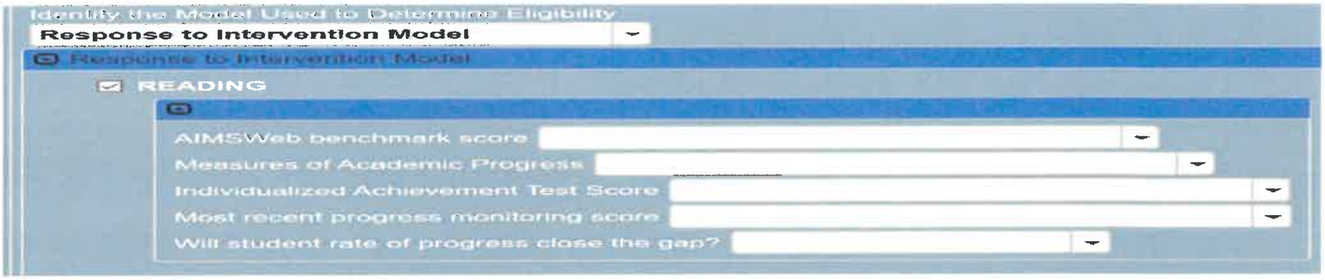
Identify the Model Used to Determine Eligibility

The eligibility team must fully describe the method used and justify the eligibility decision.

Team Comments

The basis for consideration of a learning disability must be supported by data listed in this report

1. "Suspected Learning Disability" box will be checked and this area completed by School Psychologist if student was evaluated in Academic areas
   a. Any Areas of Suspected Disability would be checked
   b. Model Used will be identified from the dropdown
   c. Team Comments box is optional



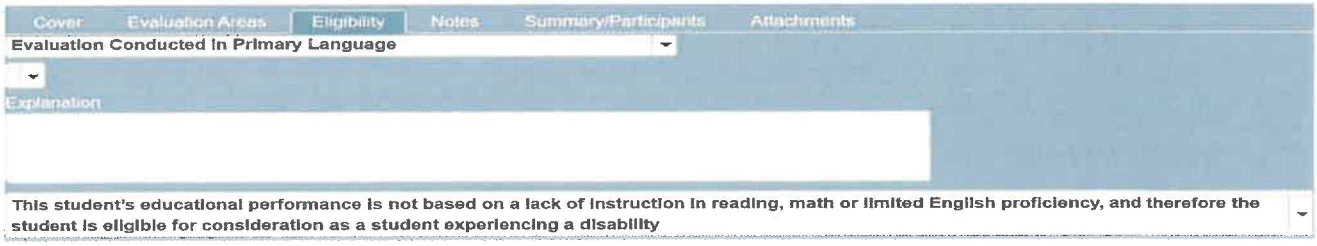
Identify the Model Used to Determine Eligibility: Response to Intervention Model

Response to Intervention Model

☑ READING

AIMSWeb benchmark score
Measures of Academic Progress
Individualized Achievement Test Score
Most recent progress monitoring score
Will student rate of progress close the gap?

1. If Response to Intervention is chosen, check boxes for Reading, Writing, and Math open
   b. School Psychologist will check areas as appropriate, and complete the dropdowns

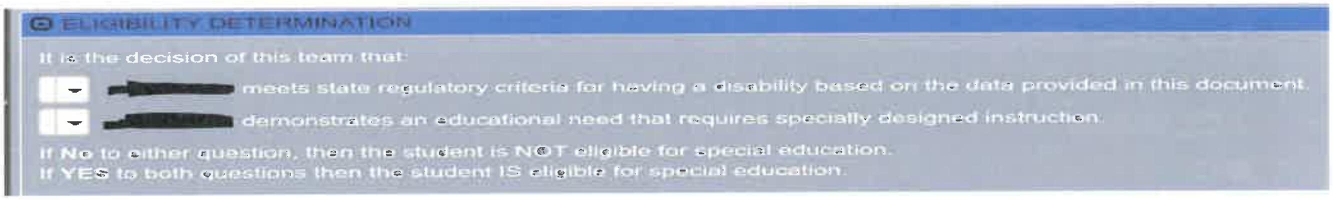


Evaluation Conducted in Primary Language

Explanation

This student's educational performance is not based on a lack of instruction in reading, math or limited English proficiency, and therefore the student is eligible for consideration as a student experiencing a disability

1. One option must be picked from the "Primary Language" dropdown
   a. If the evaluation was not conducted in the student's primary language, an Explanation must be entered
2. One option must be picked from the "Educational Performance" dropdown


ELIGIBILITY DETERMINATION

It is the decision of this team that:

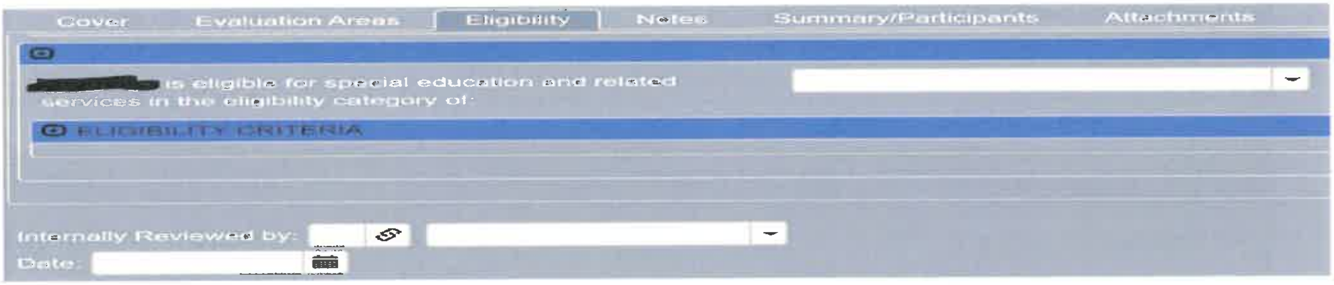
[redacted] meets state regulatory criteria for having a disability based on the data provided in this document.

[redacted] demonstrates an educational need that requires specially designed instruction.

If No to either question, then the student is NOT eligible for special education.

If YES to both questions then the student IS eligible for special education.

1. School Psychologist will document eligibility by choosing Yes or No from the 2 dropdowns. Both must be completed, and both must be Yes for student to qualify


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
ELIGIBILITY CRITERIA

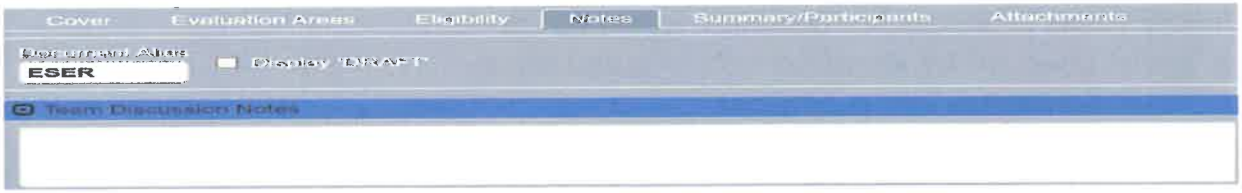
[redacted] is eligible for special education and related services in the eligibility category of:

Internally Reviewed by:

Date:

1. School Psychologist will choose an Eligibility Category in the box to the right
   a. An explanation of the Category criteria will auto-populate into the document
2. School Psychologist will enter his/her name, pick professional credentials from the dropdown
   a. For **ALL** Additional Assessments: The School Psychologist assigned to the school site reviews and signs off on the ESER
3. School Psychologist will print this page to sign, date, and give to Case Manager.

D. Notes

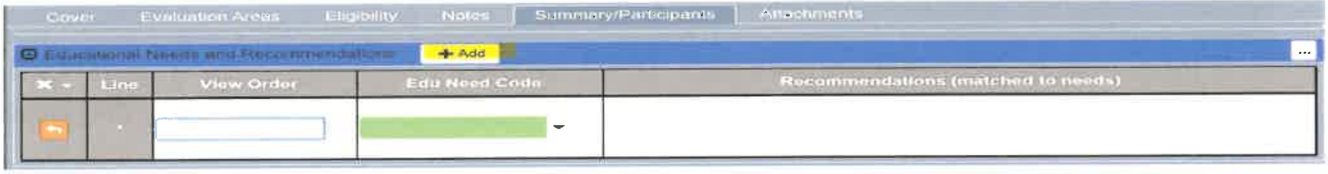

Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Team Discussion Notes

Document Alias: ESER

☐ Display 'DRAFT'

1. Eligibility Determination meeting notes must be typed (handwritten notes are returned to the Case Manager for the working file)

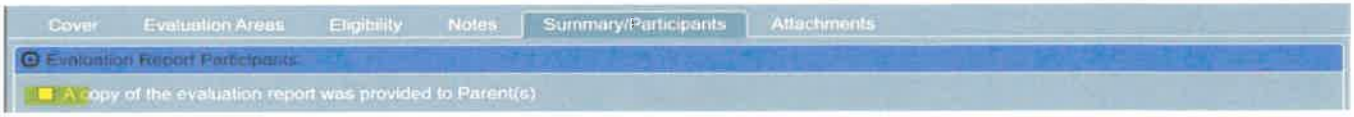
E. Summary/Participants (this page generates the signature page for the ESER meeting)


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Educational Needs and Recommendations
+ Add
...

X	Line	View Order	Edu Need Code	Recommendations (matched to needs)

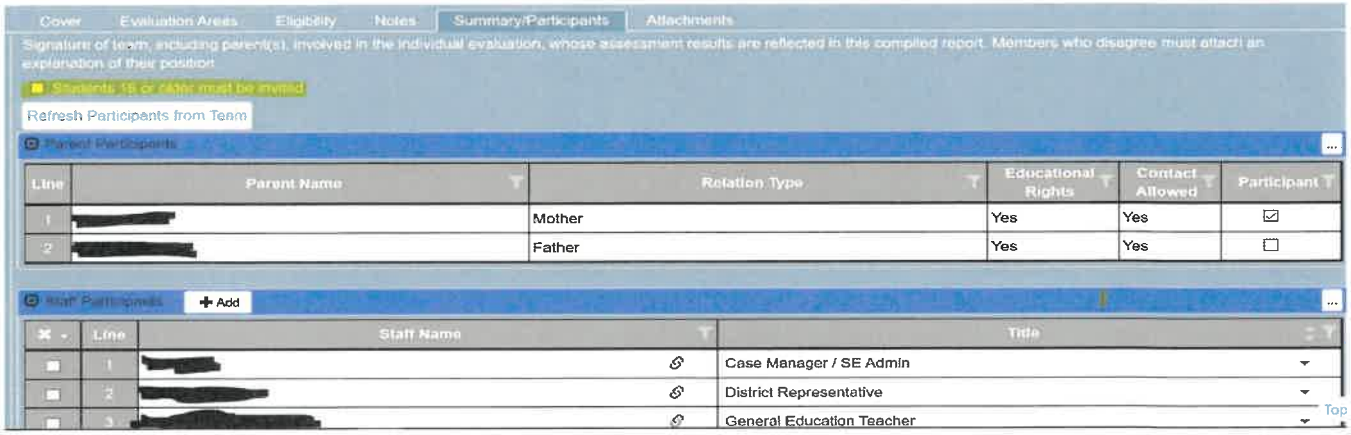
1. Each evaluator will put their area into the grid as an Educational Need by using the +Add button, if the student qualifies in that area
2. Each evaluator will also write a Recommendation to match the Need
3. School Psychologist will enter the original/existing Educational Needs and Recommendations so all the Student's eligible areas are listed here

- **The full Evaluation data in prior ESERs does not need to be copied/pasted into this Evaluation Report. Only the existing Needs and Recommendations.**


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Evaluation Report Participants

A copy of the evaluation report was provided to Parent(s)

1. The box indicating a copy of the report was provided to Parents/Guardians must be checked
   a. ESER is not available in ParentVUE; copy will be sent home by the Records Specialist


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Refresh Participants from Team
Parent Participants
Staff Participants
+ Add
Top

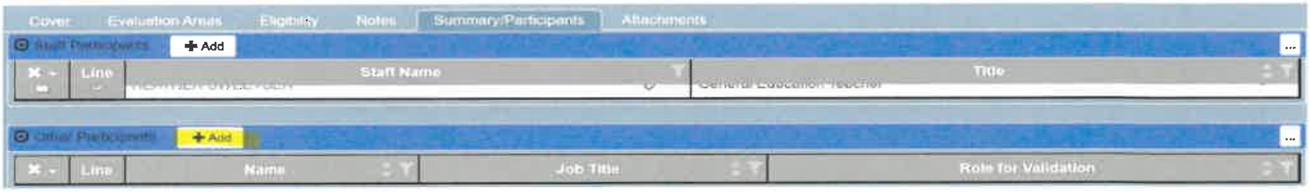
Signature of team, including parent(s), involved in the individual evaluation, whose assessment results are reflected in this compiled report. Members who disagree must attach an explanation of their position

Students 16 or older must be invited

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	[redacted]	Mother	Yes	Yes	☑
2	[redacted]	Father	Yes	Yes	☐

	Line	Staff Name	Title
☐	1	[redacted]	Case Manager / SE Admin
☐	2	[redacted]	District Representative
☐	3	[redacted]	General Education Teacher

1. Students 16 years of age or older must be invited to the meeting, box must be checked
2. Parents/Guardians names will auto-populate from the Student Information System "Participant" box must be checked for Parent/Guardan signature line to generate
3. Staff Names and Title/Role at the meeting must be entered and clearly indicated (gridlines can be added by using the +Add button)
   a. Typically a meeting requires 3 primary roles: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
   b. This means **a minimum of 3 persons**. One person cannot fill more than one primary role a meeting (for example, Case Manager cannot also be the District Rep)
   c. For students attending Mat-Su Day School, Mat-Su Secondary, or *Preschool a General Ed Teacher is not required (*unless the meeting is Kindergarten transition)

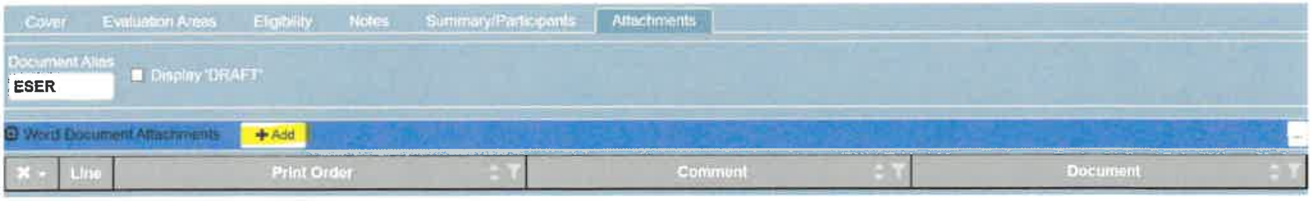

Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Staff Participants
+ Add
Other Participants
+ Add

Line	Staff Name	Title
		General Education Teacher

Line	Name	Job Title	Role for Validation

1. Attendees from an agency, or any other outside participants, can also be added here

F. Attachments


Cover
Evaluation Areas
Eligibility
Notes
Summary/Participants
Attachments
Word Document Attachments
+ Add

Document Alias: ESER

☐ Display 'DRAFT'

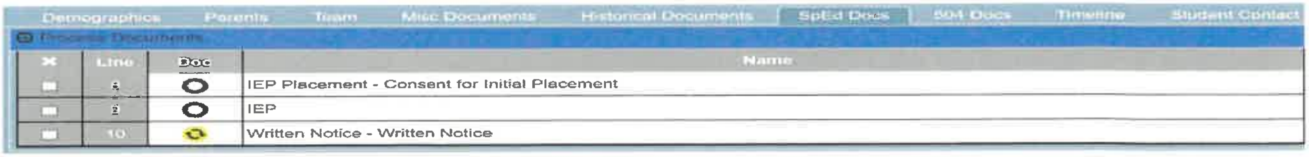
Line	Print Order	Comment	Document

1. Original signature pages pertaining to the Eligibility meeting are uploaded and attached here, using the +Add button (PDF versions are preferred)
   a. The eligibility page signed by the School Psych (Or Speech Path if speech only)
   b. The ESER meeting team signature

Reviewing the Individual Education Program (IEP):

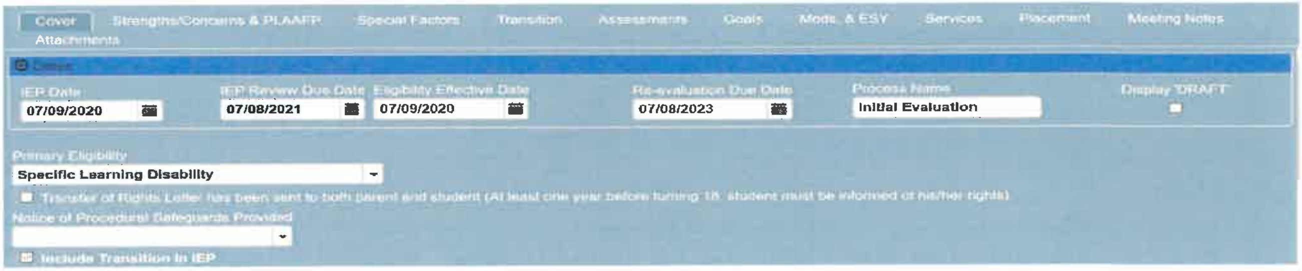
***Print Preview format is recommended for document review**

Student SE Record>SpEd Docs tab>Process Documents



✕	Line	Doc	Name
☐	8	○	IEP Placement - Consent for Initial Placement
☐	2	○	IEP
☐	10		Written Notice - Written Notice

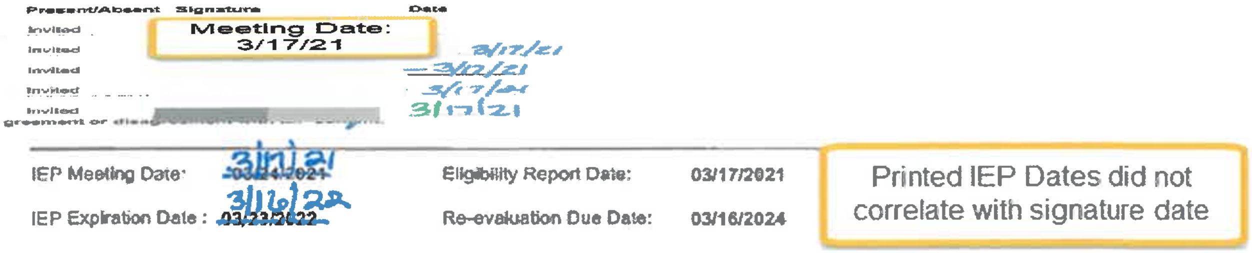
A. Cover (this page generates the signature page for the IEP meeting)



IEP Date: 07/09/2020
IEP Review Due Date: 07/08/2021
Eligibility Effective Date: 07/09/2020
Re-evaluation Due Date: 07/08/2023
Process Name: Initial Evaluation
Display 'DRAFT' ☐
Primary Eligibility: Specific Learning Disability
☐ Transfer of Rights Letter has been sent to both parent and student (At least one year before turning 18, student must be informed of his/her rights)
Notice of Procedural Safeguards Provided:
☐ Include Transition in IEP

1. IEP Date field is the date of the IEP meeting
2. IEP Review Due Date is the date by which the next annual review must take place
   - a. This field will auto-calculate based on the IEP Date entered: 1 year minus 1 day
   - b. Both fields are open and can be modified
3. Eligibility Effective Date is the date of the most recent Eligibility Determination
4. Re-evaluation Due Date: date by which the next reevaluation must be completed: 3 years minus 1 day
   - a. Fields auto-populate from the ESER and can only be modified by Student Support Services. Contact your Records Technician
5. Process Name indicates the current Process the student is in
   - a. Field auto-populates from the Sped Docs tab, is locked, and cannot be modified
6. The Team may choose to check the "Display DRAFT" box until the meeting. **The box must be unchecked in order for the IEP to Finalize**
7. Primary Eligibility auto-populated from the ESER
   - a. Field is locked and can only be corrected by Student Support Services
8. Transfer of Rights box must completed and box checked for students aged 17+
9. An option from Notice of Procedural Safeguards dropdown must be chosen
10. "Include Transition" box will auto-check for Students aged 15+, and field is locked
    - a. Box is open and can be manually checked prior to age 15+

- If the IEP Meeting/Expiration Dates, and/or Eligibility/Reeval Due dates don't match the meeting date as indicated by Team signatures, cross out the dates and hand write the correct dates before uploading **(Do not use White Out on Special Education paperwork, as these are legal documents)**:



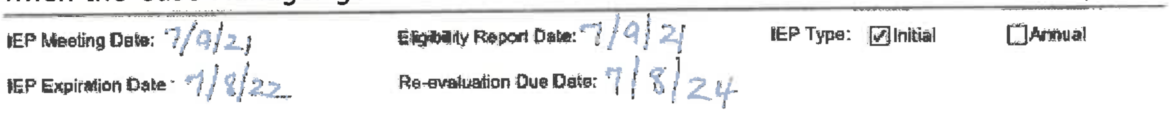
Present/Absent	Signature	Date
Invited	Meeting Date: 3/17/21	3/17/21
Invited		~~3/12/21~~
Invited		3/17/21
Invited		3/17/21
Invited	[redacted]	

greement or disagreement with ... [redacted]

IEP Meeting Date: ~~03/24/2021~~ 3/17/21
IEP Expiration Date : ~~03/23/2022~~ 3/16/22
Eligibility Report Date: 03/17/2021
Re-evaluation Due Date: 03/16/2024

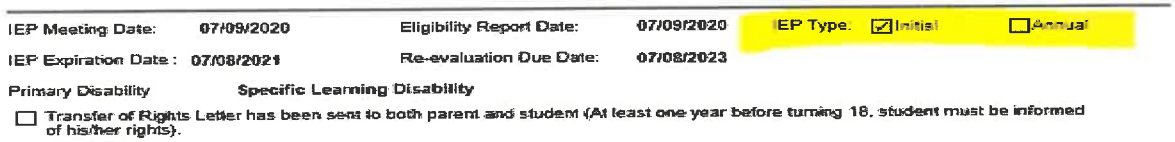
Printed IEP Dates did not correlate with signature date

- The Signature page for an Initial IEP may not have any of the dates populated at the top, depending on when the Case Manager generated it. The dates can be handwritten in before uploading:

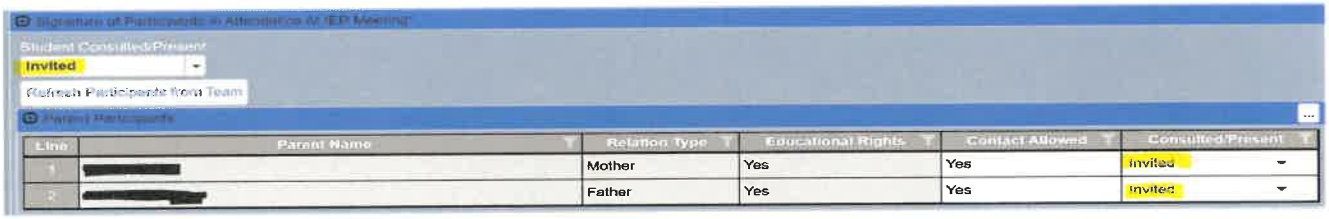


IEP Meeting Date: 7/9/21
Eligibility Report Date: 7/9/21
IEP Type: ☑ Initial ☐ Annual
IEP Expiration Date: 7/8/22
Re-evaluation Due Date: 7/8/24

- The IEP Type boxes (Initial or Annual) **do not** display on the screen. Type is identified by the Process, and appears on the printed document:



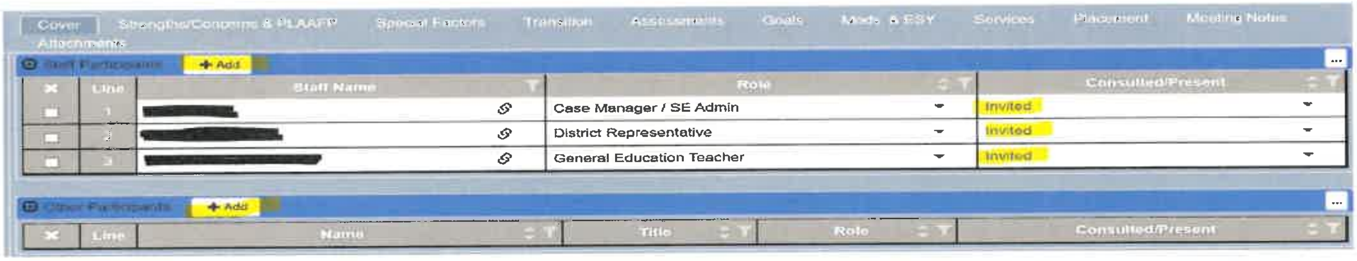
IEP Meeting Date: 07/09/2020
Eligibility Report Date: 07/09/2020
IEP Type: ☑ Initial ☐ Annual
IEP Expiration Date : 07/08/2021
Re-evaluation Due Date: 07/08/2023
Primary Disability Specific Learning Disability
☐ Transfer of Rights Letter has been sent to both parent and student (At least one year before turning 18, student must be informed of his/her rights).



Signature of Participants in Attendance At IEP Meeting
Student Consulted/Present: Invited
Refresh Participants from Team
Parent Participants

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	[redacted]	Mother	Yes	Yes	Invited
2	[redacted]	Father	Yes	Yes	Invited

1. Student Consulted/Present box should have "Invited" chosen from the dropdown
2. Parent/Guardian information will auto-populate from the Student Information System
   a. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page



Staff Participants

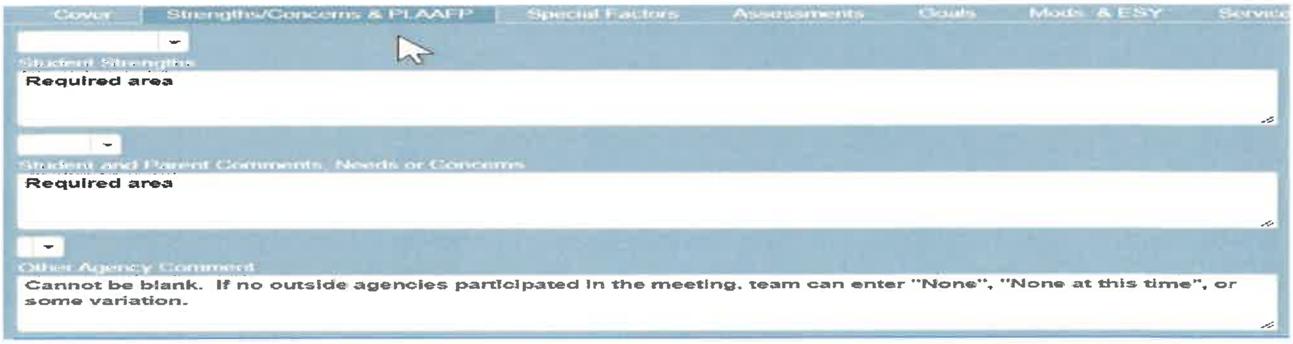
✖	Line	Staff Name	Role	Consulted/Present
☐	1	[redacted]	Case Manager / SE Admin	Invited
☐	2	[redacted]	District Representative	Invited
☐	3	[redacted]	General Education Teacher	Invited

Other Participants

✖	Line	Name	Title	Role	Consulted/Present

1. Staff Names and Title/Role at the meeting must be entered and clearly indicated (gridlines can be added by using the +Add button)
   a. Typically a meeting requires 3 primary roles, at a minimum: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
   b. This means a minimum of 3 persons. One person cannot fill more than one primary role a meeting (for example, the Case Manager cannot also be a District Rep)
   c. "Invited" must be picked from the Consulted/Present dropdown for names for signature lines to generate on the printed page
2. Attendees from an outside agency, or any other participants, can be identified/added under the Other Participants grid, using the +Add button

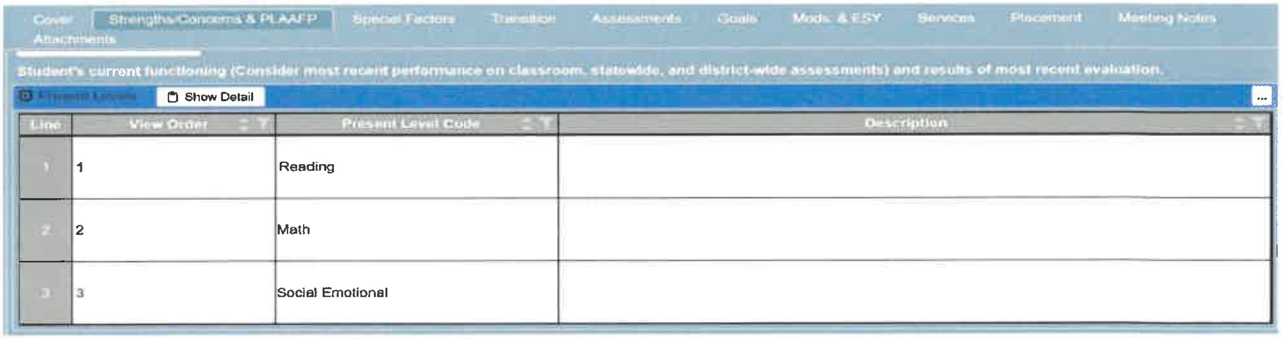
B. Strengths/Concerns & Present Levels of Academic Achievement and Functional Performance (PLAAFP)


Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. & ESY
Service

Student Strengths
Required area

Student and Parent Comments, Needs or Concerns
Required area

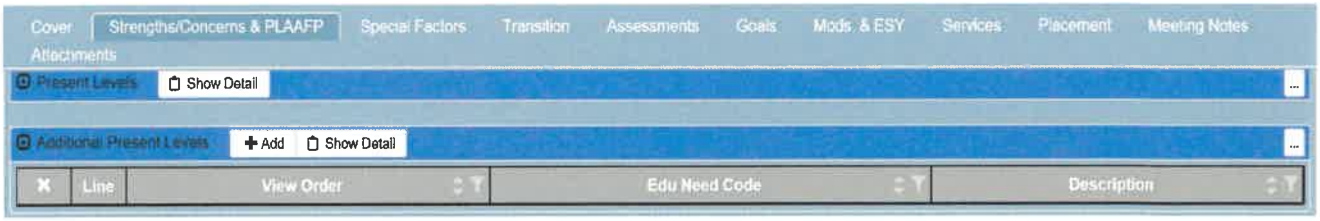
Other Agency Comment
Cannot be blank. If no outside agencies participated in the meeting, team can enter "None", "None at this time", or some variation.


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Present Levels
Show Detail
...

Student's current functioning (Consider most recent performance on classroom, statewide, and district-wide assessments) and results of most recent evaluation.

Line	View Order	Present Level Code	Description
1	1	Reading	
2	2	Math	
3	3	Social Emotional	

1. Present Levels auto-populate from the Summary/Participant page of the ESER, in the rank order the Team placed them (Educational Needs to IEP Services "Flow")
   a. View Order and Present Level Code are locked
   b. Current Present Level information is entered in the Description column
   c. These areas require Goals and Service Minutes. IEP will not Finalize if Present Levels, Goals, and Services do not match

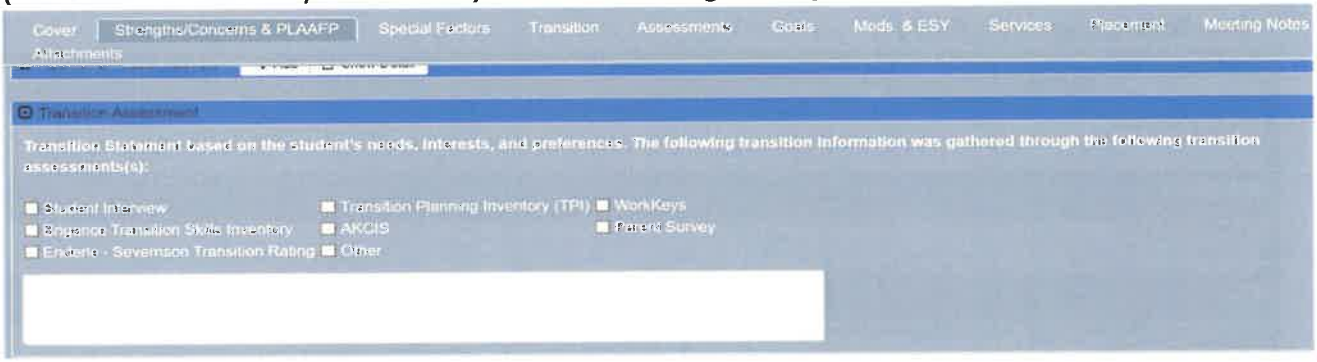

Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Present Levels
Show Detail
...
Additional Present Levels
+ Add
Show Detail
...

✖	Line	View Order	Edu Need Code	Description

1. Health can be added under Additional Present Levels by using the +Add button, for issues/concerns the Team wants included in the IEP
   a. Adding any other Area/Category to this grid will require Goals and Services

❖ **Note**: Additional Present Levels area originally auto-populated in data conversion from iPlan. Once the student has an evaluation and a Synergy ESER, all Needs will populate in the upper Present Levels grid. **All Additional Present Level description information should be moved to the upper Present Levels if appropriate, *and all old Additional Present Level lines should then be deleted.***

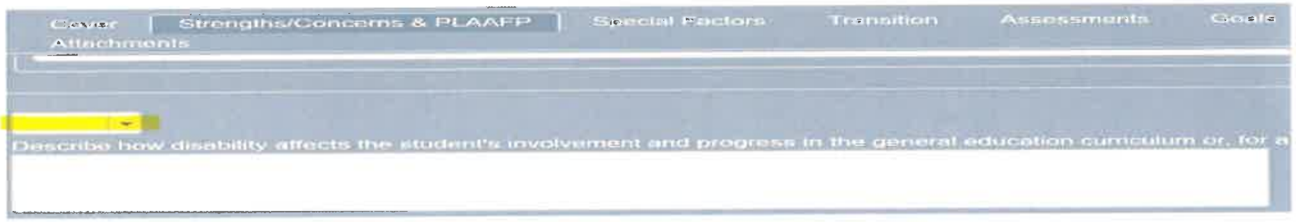
(This section will be present only for students age 15+)


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Transition Assessment

Transition Statement based on the student's needs, interests, and preferences. The following transition information was gathered through the following transition assessments(s):

- ☐ Student Interview
- ☐ Brigance Transition Skills Inventory
- ☐ Enderle - Severnson Transition Rating
- ☐ Transition Planning Inventory (TPI)
- ☐ AKCIS
- ☐ Other
- ☐ WorkKeys
- ☐ Parent Survey

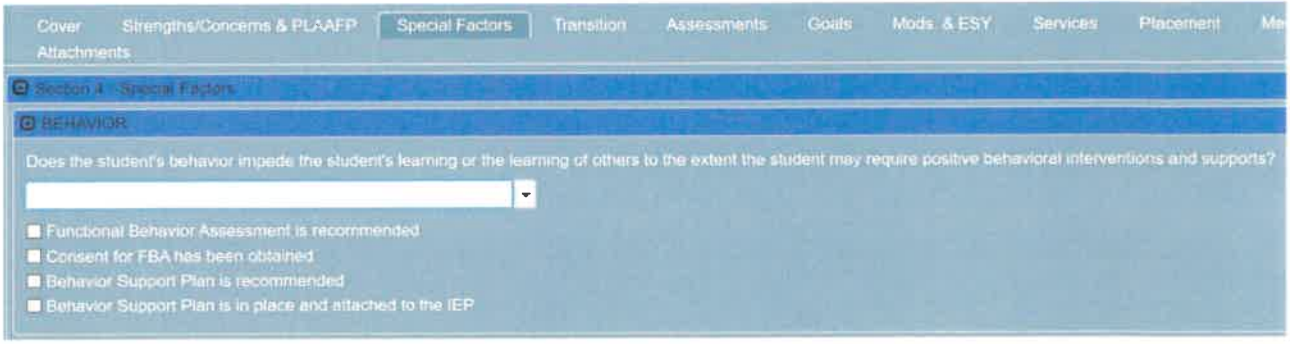
1. At least 1 assessment must be indicated
2. Statement regarding assessment/information gained from the student is required


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Attachments

Describe how disability affects the student's involvement and progress in the general education curriculum or, for a

1. "How disability affects" description is required
    a. Highlighted dropdown contains a library of statements that can be used, or Case Managers may write their own

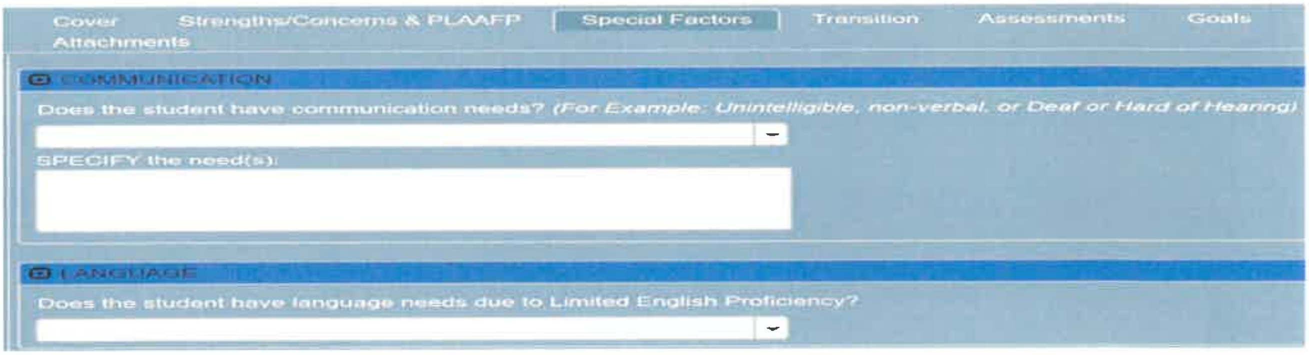
C. Special Factors


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Attachments
Section 4 - Special Factors
BEHAVIOR

Does the student's behavior impede the student's learning or the learning of others to the extent the student may require positive behavioral interventions and supports?

☐ Functional Behavior Assessment is recommended
☐ Consent for FBA has been obtained
☐ Behavior Support Plan is recommended
☐ Behavior Support Plan is in place and attached to the IEP

1. Yes or No must be indicated in the dropdown
2. If Yes, one of the 4 boxes below the dropdown must be checked
    a. If Team not ready to write a Behavior Plan, choose "Behavior Support Plan is recommended"

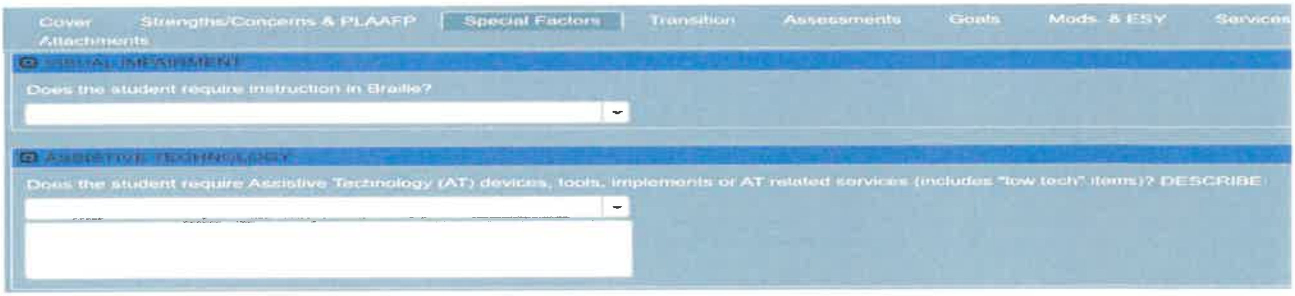

Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Attachments
COMMUNICATION
LANGUAGE

Does the student have communication needs? *(For Example: Unintelligible, non-verbal, or Deaf or Hard of Hearing)*

SPECIFY the need(s):

Does the student have language needs due to Limited English Proficiency?

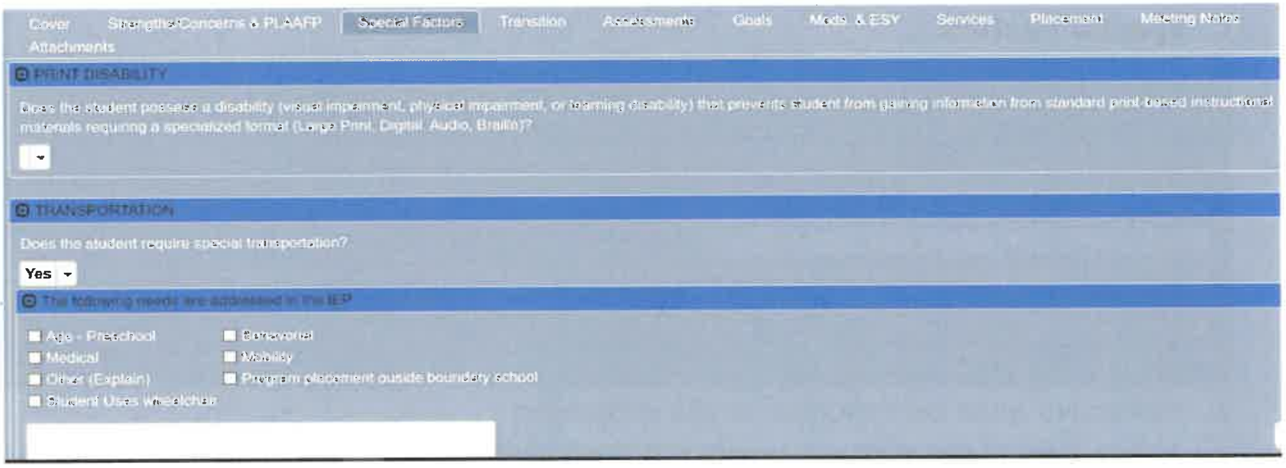
1. Communication: Yes or No must be chosen from the dropdown
    a. If Yes, the "Specify the Needs" box must be completed
2. Language: Yes or No must be chosen from the dropdown


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Attachments
VISUAL IMPAIRMENT
ASSISTIVE TECHNOLOGY

Does the student require instruction in Braille?

Does the student require Assistive Technology (AT) devices, tools, implements or AT related services (includes "low tech" items)? DESCRIBE

1. Visual Impairment: Yes or No must be chosen from the dropdown
2. Assistive Technology: Yes or No must be chosen from the dropdown
    a. If Yes, AT supports/devices must be described/listed in the text box


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments

PRINT DISABILITY

Does the student possess a disability (visual impairment, physical impairment, or learning disability) that prevents student from gaining information from standard print-based instructional materials requiring a specialized format (Large Print, Digital, Audio, Braille)?

TRANSPORTATION

Does the student require special transportation?

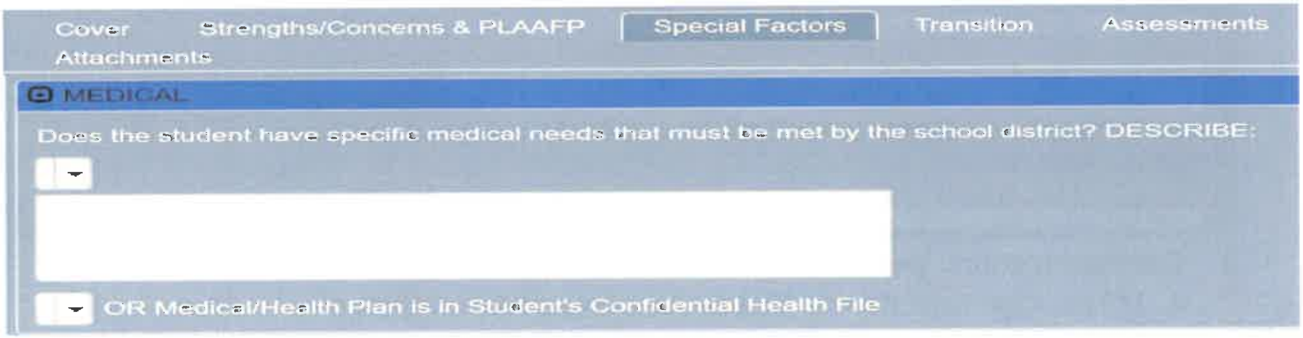
Yes

The following needs are addressed in the IEP

☐ Age - Preschool
☐ Medical
☐ Other (Explain)
☐ Student Uses Wheelchair
☐ Behavioral
☐ Mobility
☐ Program placement ouside boundary school

1. Print Disability: Yes or No must be chosen from the dropdown
2. Special Education Transportation: Yes or No must be chosen from the dropdown
    a. If Yes, the reason the student requires special transportation must be identified
    b. If "Other" is checked, it must be further explained in the open text box

Transportation must then be listed as a Related Service in the Services page of the IEP


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Attachments

MEDICAL

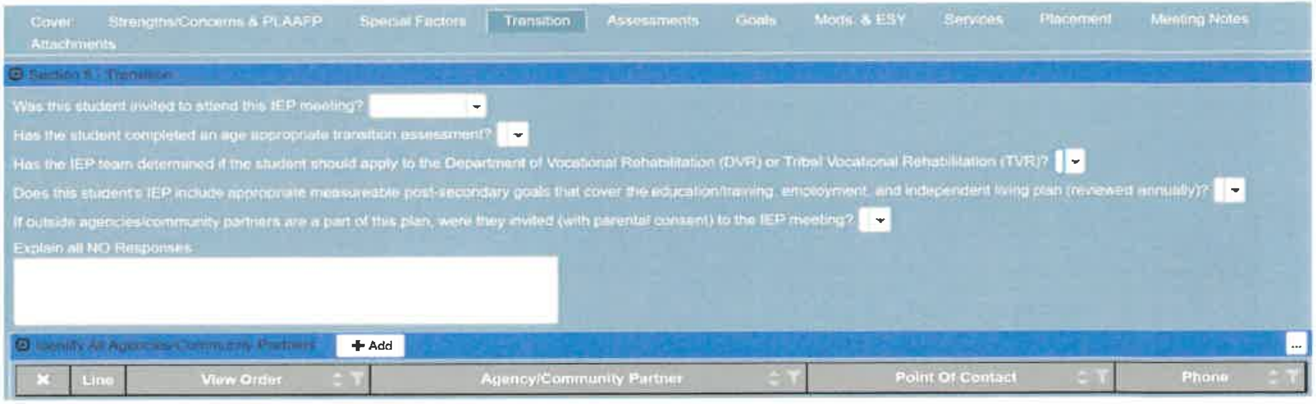
Does the student have specific medical needs that must be met by the school district? DESCRIBE:

OR Medical/Health Plan is in Student's Confidential Health File

1. Medical: Yes or No must be chosen from the first dropdown
    a. If Yes, needs can be described in the open text box
2. "Plan is in Student's Health File": Yes or No must be chosen from the dropdown

7/29/21

D. Transition *(for Students age 15+)*


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Section 5 - Transition
+ Add
...

Was this student invited to attend this IEP meeting?

Has the student completed an age appropriate transition assessment?

Has the IEP team determined if the student should apply to the Department of Vocational Rehabilitation (DVR) or Tribal Vocational Rehabilitation (TVR)?

Does this student's IEP include appropriate measureable post-secondary goals that cover the education/training, employment, and independent living plan (reviewed annually)?

If outside agencies/community partners are a part of this plan, were they invited (with parental consent) to the IEP meeting?

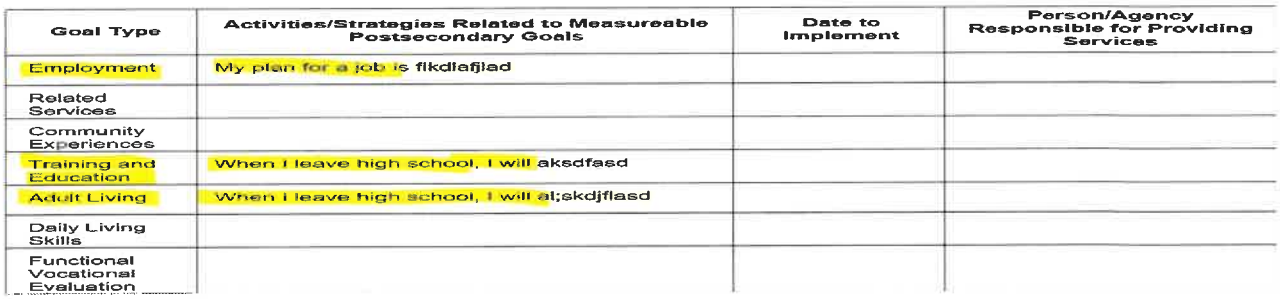
Explain all NO Responses

Identify All Agencies/Community Partners

✕	Line	View Order	Agency/Community Partner	Point Of Contact	Phone

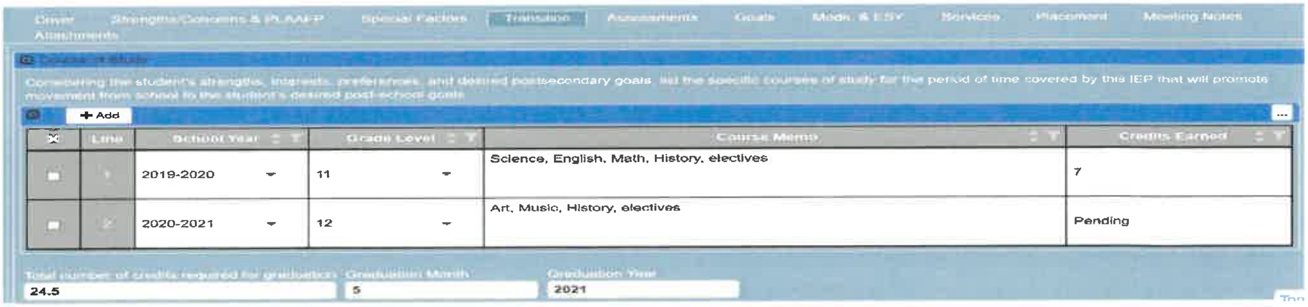
1. The first 4 questions should be answered 'yes'
2. Any "No" responses must be explained in the open text box
3. Last question may be "N/A". If "yes", should be addressed the "Transition Consent" tab in the Invitation. Parent permission MUST be given to invite an outside agency
4. It is best practice for the local DVR (Division of Vocational Rehabilitation) agency contact number to be entered in the Agency/Partners grid, but not required

STATEMENT OF TRANSITION SERVICES: COORDINATED ACTIVITIES/STRATEGIES



Goal Type	Activities/Strategies Related to Measureable Postsecondary Goals	Date to Implement	Person/Agency Responsible for Providing Services
Employment	My plan for a job is fikdlafjlad		
Related Services			
Community Experiences			
Training and Education	When I leave high school, I will aksdfasd		
Adult Living	When I leave high school, I will al;skdjflasd		
Daily Living Skills			
Functional Vocational Evaluation			

1. The highlighted areas are required for every student
   a. The highlighted prompt statements should be left in, as part of the statement
   a. Date to Implement and Persons/Agencies Responsible must be entered
2. Other areas are completed if applicable to student needs


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Course of Study
+ Add
...
Top

Considering the student's strengths, interests, preferences, and desired postsecondary goals, list the specific courses of study for the period of time covered by this IEP that will promote movement from school to the student's desired post-school goals

✕	Line	School Year	Grade Level	Course Memo	Credits Earned
☐	1	2019-2020	11	Science, English, Math, History, electives	7
☐	2	2020-2021	12	Art, Music, History, electives	Pending

Total number of credits required for graduation: 24.5

Graduation Month: 5

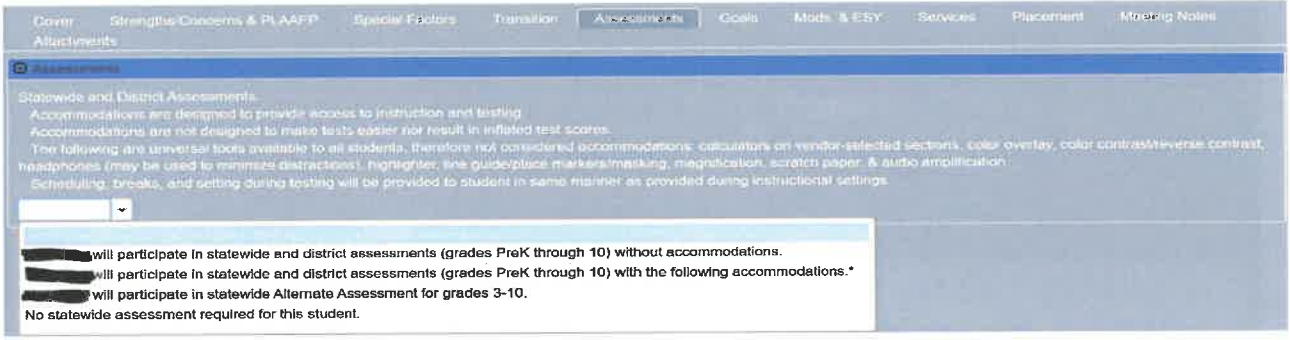
Graduation Year: 2021

1. Student's classes/course of study will be documented here
   a. Only the number of completed credits should be listed in the Credits Earned column
   b. Classes/courses can be projected out; the Credits Earned column should be left blank, or can note Pending/In Progress
2. Total Credits Required and Anticipated Month/Year of Graduation must be entered

❖ For questions regarding Transition Plans, contact the school's Resource Specialist

7/29/21

E. Testing/Assessment Accommodations

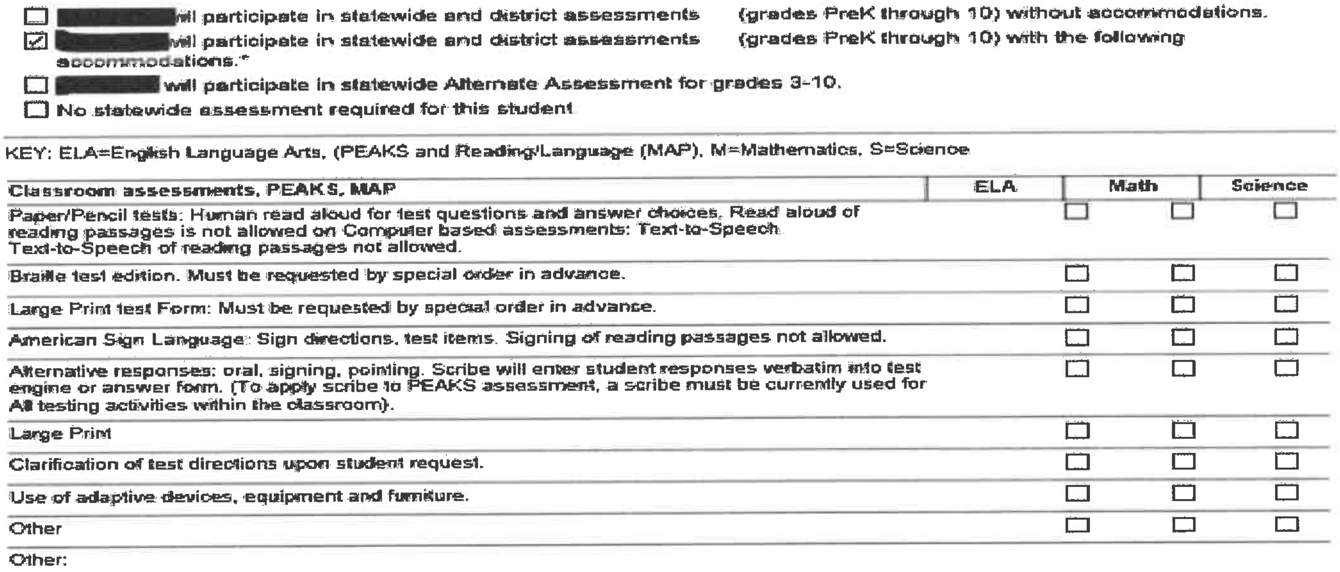


Statewide and District Assessments.
Accommodations are designed to provide access to instruction and testing.
Accommodations are not designed to make tests easier nor result in inflated test scores.
The following are universal tools available to all students, therefore not considered accommodations: calculators on vendor-selected sections, color overlay, color contrast/reverse contrast, headphones (may be used to minimize distractions), highlighter, line guide/place markers/masking, magnification, scratch paper & audio amplification.
Scheduling, breaks, and setting during testing will be provided to student in same manner as provided during instructional settings.

[redacted] will participate in statewide and district assessments (grades PreK through 10) without accommodations.
[redacted] will participate in statewide and district assessments (grades PreK through 10) with the following accommodations.*
[redacted] will participate in statewide Alternate Assessment for grades 3-10.
No statewide assessment required for this student.

1. One of the options must be chosen from the dropdown
2. If Option 2 or 3 is chosen, further information will be required
3. Option 4 should be chosen for High School students in grades 11 and 12. Classroom Accommodations should now be in Section 8, "Modifications and Supports"

Option 2:



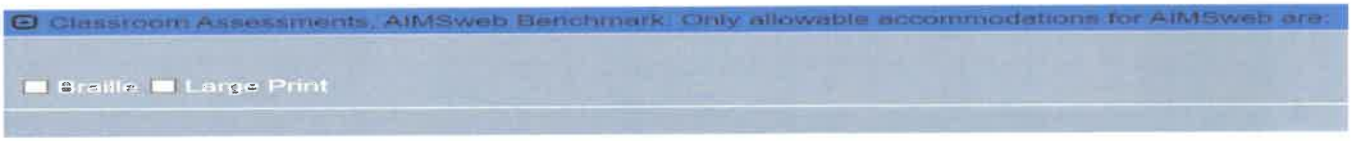
☐ [redacted] will participate in statewide and district assessments (grades PreK through 10) without accommodations.
☑ [redacted] will participate in statewide and district assessments (grades PreK through 10) with the following accommodations.*
☐ [redacted] will participate in statewide Alternate Assessment for grades 3-10.
☐ No statewide assessment required for this student

KEY: ELA=English Language Arts, (PEAKS and Reading/Language (MAP), M=Mathematics, S=Science

Classroom assessments, PEAKS, MAP	ELA	Math	Science
Paper/Pencil tests: Human read aloud for test questions and answer choices. Read aloud of reading passages is not allowed on Computer based assessments: Text-to-Speech Text-to-Speech of reading passages not allowed.	☐	☐	☐
Braille test edition. Must be requested by special order in advance.	☐	☐	☐
Large Print test Form: Must be requested by special order in advance.	☐	☐	☐
American Sign Language: Sign directions, test items. Signing of reading passages not allowed.	☐	☐	☐
Alternative responses: oral, signing, pointing. Scribe will enter student responses verbatim into test engine or answer form. (To apply scribe to PEAKS assessment, a scribe must be currently used for All testing activities within the classroom).	☐	☐	☐
Large Print	☐	☐	☐
Clarification of test directions upon student request.	☐	☐	☐
Use of adaptive devices, equipment and furniture.	☐	☐	☐
Other	☐	☐	☐

Other:

1. Case Manager must identify which content area each chosen Accommodation will be applied to
   a. If Other is chosen, the Accommodation(s) must be identified in the text box



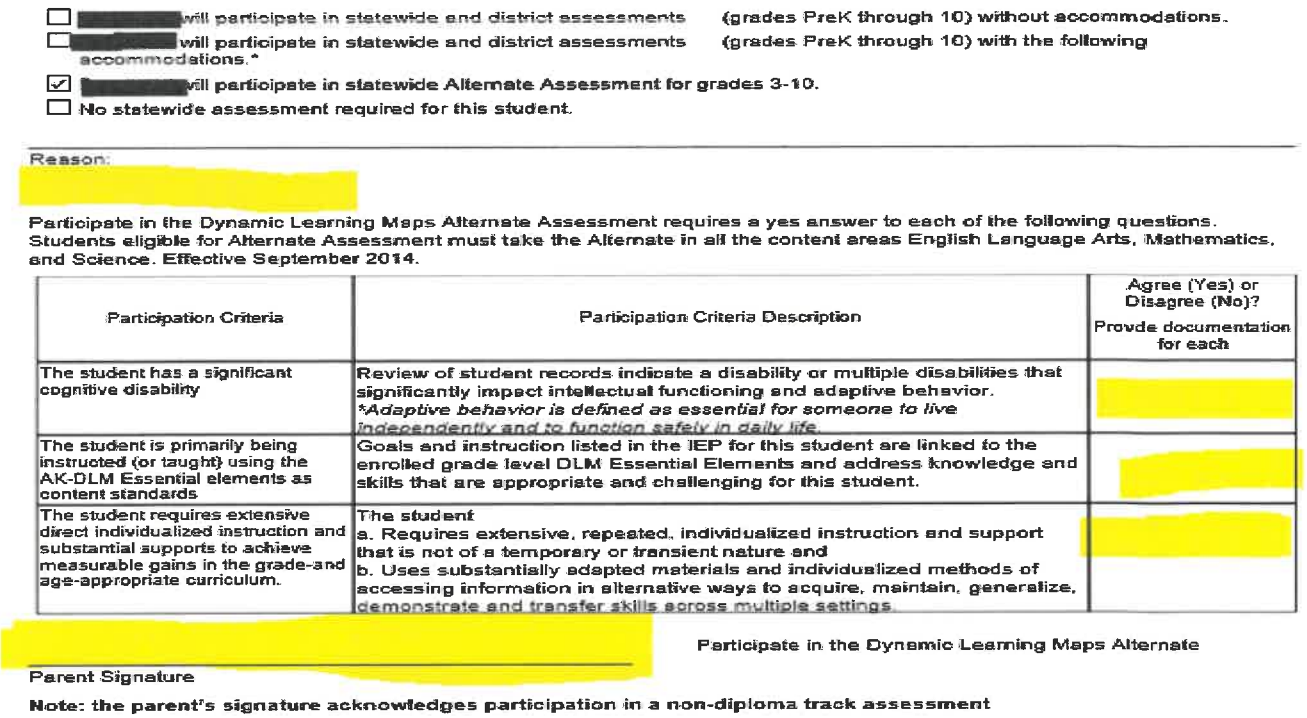
Classroom Assessments, AIMSweb Benchmark: Only allowable accommodations for AIMSweb are:

☐ Braille ☐ Large Print

1. If a student requires Braille or Large Print for the AIMSweb, it is noted here

7/29/21

Option 3



☐ [redacted] will participate in statewide and district assessments (grades PreK through 10) without accommodations.
☐ [redacted] will participate in statewide and district assessments (grades PreK through 10) with the following accommodations.*
☑ [redacted] will participate in statewide Alternate Assessment for grades 3-10.
☐ No statewide assessment required for this student.

Reason:

Participate in the Dynamic Learning Maps Alternate Assessment requires a yes answer to each of the following questions. Students eligible for Alternate Assessment must take the Alternate in all the content areas English Language Arts, Mathematics, and Science. Effective September 2014.

Participation Criteria	Participation Criteria Description	Agree (Yes) or Disagree (No)? Provde documentation for each
The student has a significant cognitive disability	Review of student records indicate a disability or multiple disabilities that significantly impact intellectual functioning and adaptive behavior. **Adaptive behavior is defined as essential for someone to live independently and to function safely in daily life.*	
The student is primarily being instructed (or taught) using the AK-DLM Essential elements as content standards	Goals and instruction listed in the IEP for this student are linked to the enrolled grade level DLM Essential Elements and address knowledge and skills that are appropriate and challenging for this student.	
The student requires extensive direct individualized instruction and substantial supports to achieve measurable gains in the grade-and age-appropriate curriculum.	The student a. Requires extensive, repeated, individualized instruction and support that is not of a temporary or transient nature and b. Uses substantially adapted materials and individualized methods of accessing information in alternative ways to acquire, maintain, generalize, demonstrate and transfer skills across multiple settings.	

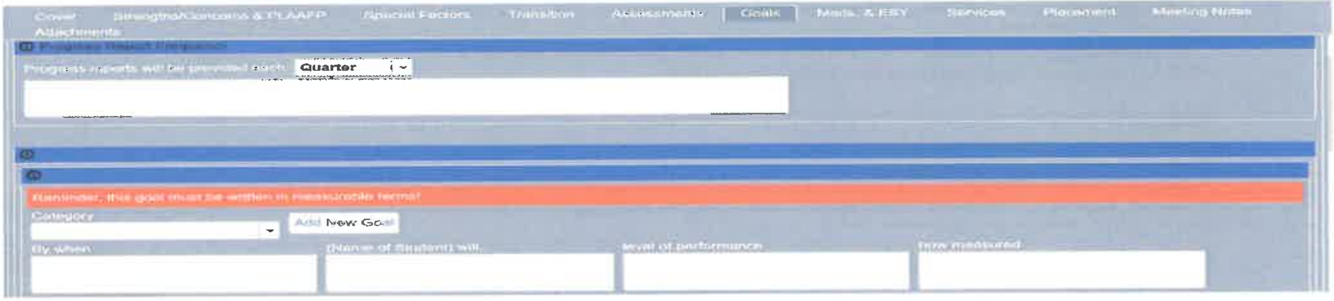
Parent Signature

Participate in the Dynamic Learning Maps Alternate

Note: the parent's signature acknowledges participation in a non-diploma track assessment

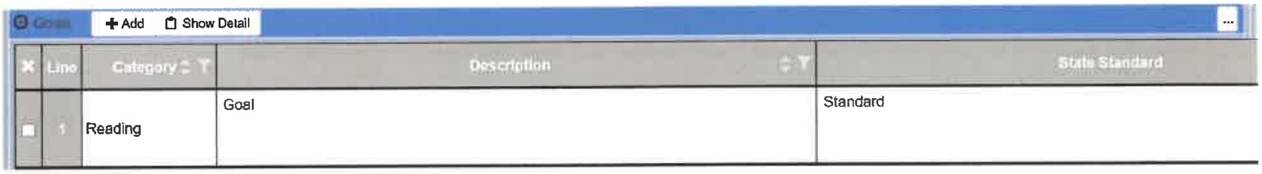
1. Case Manager must explain in the open text box the reason the student requires Alternate Assessment
2. Case Manager must answer all 3 questions in the grid (chosen from the dropdown)
    a. Participation in the Alternate Assessment requires all answers be "Yes"
3. Parent signature is **required each year, at the Annual IEP meeting**, if the student continues to remain on the alternate assessment track

F. Goals and Objectives


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Progress Report Frequency
Reminder, this goal must be written in measurable terms!
Category
Add New Goal
By when
(Name of Student) will
level of performance
how measured

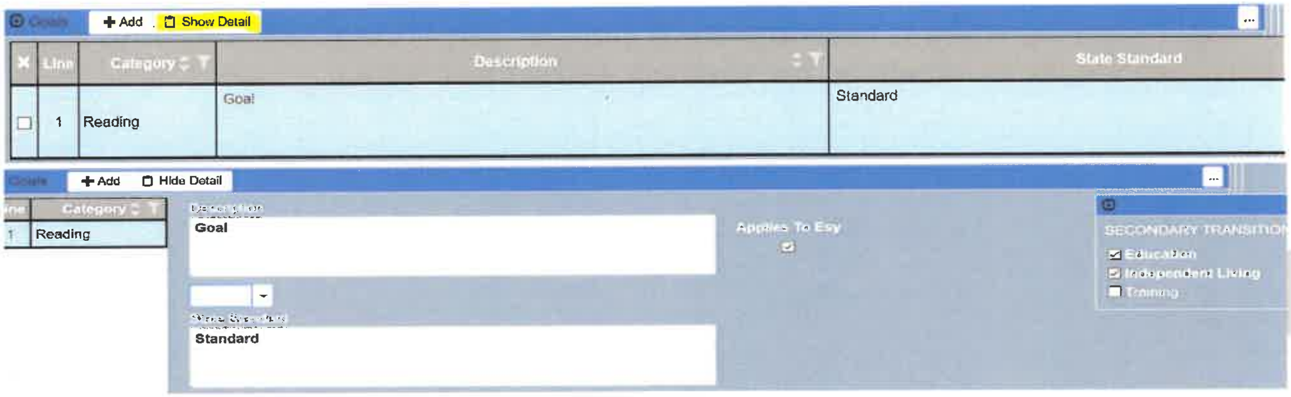
Progress reports will be provided each: Quarter

1. Progress Report frequency must be chosen from the dropdown (usually Quarterly)
2. Goal category is picked from the dropdown menu
3. Goals can be entered 2 ways:
   a. written using the goal builder text boxes as prompts/help, then click the "Add New Goal" button to populate the Goals grid
   b. typing Xs/letters into the goal builder boxes, clicking "Add New Goal". Goal line populates in the Goals grid with blank fields


Goals
Add
Show Detail
...

✖	Line	Category	Description	State Standard
☐	1	Reading	Goal	Standard

1. Goal and Standard is entered


Goals
Add
Show Detail
...
Hide Detail

✖	Line	Category	Description	State Standard
☐	1	Reading	Goal	Standard

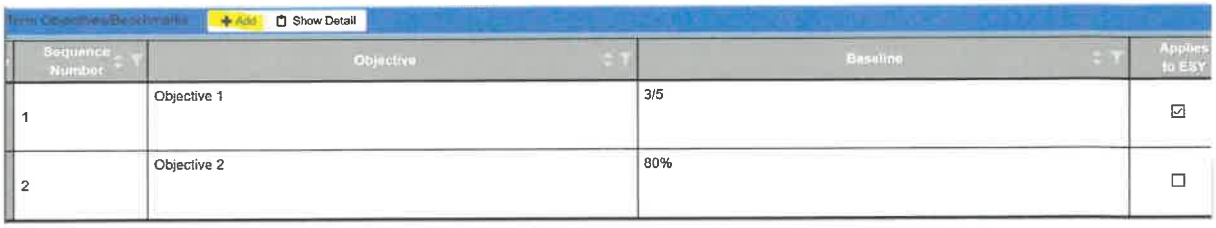
Description: Goal

Applies To Esy ☑

State Standard: Standard

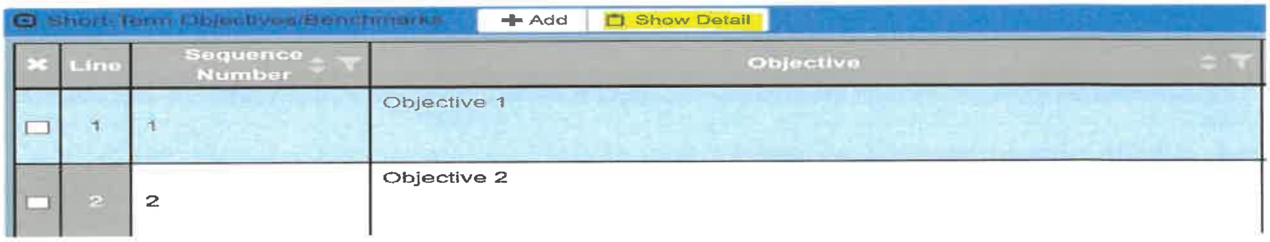
SECONDARY TRANSITION
☑ Education
☑ Independent Living
☐ Training

1. Other Goal information/data is entered by clicking the Line number to turn it blue, then clicking Show Detail
2. Goal and Standard carry over
3. If the Goal will be part of ESY services, "Applies to ESY" must be checked
4. If student is aged 15+, Secondary Transition options will show, and must be addressed.
   a. At least 1 box must be checked; denotes the Category to which the goal applies



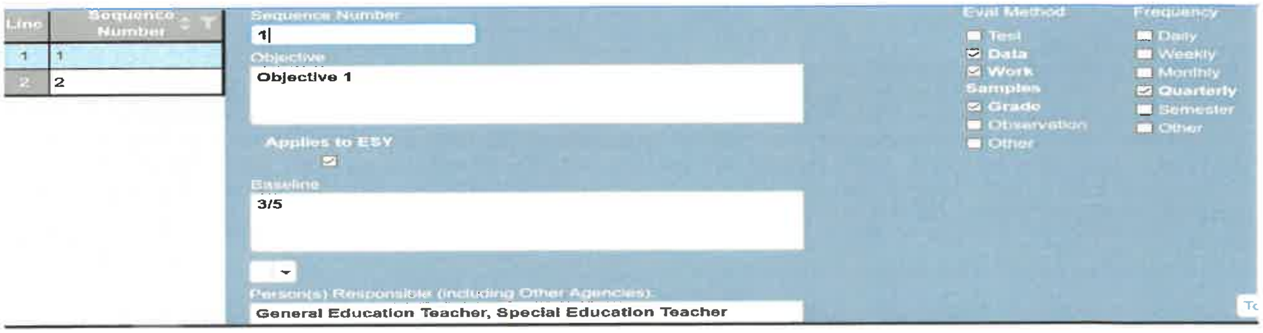
Sequence Number	Objective	Baseline	Applies to ESY
1	Objective 1	3/5	☑
2	Objective 2	80%	☐

1. Each goal must have at minimum of 2 Short-Term Objectives (using the +Add button)
    a. Each Objective must have a baseline
    b. If the Goal applies to ESY, at least one Objective must have the "Applies to ESY" box checked



✖	Line	Sequence Number	Objective
☐	1	1	Objective 1
☐	2	2	Objective 2

1. Complete Objective information is entered by clicking the Line number to turn it blue, then clicking Show Detail



Line	Sequence Number
1	1
2	2

Sequence Number: 1

Objective: Objective 1

Applies to ESY ☑

Baseline: 3/5

Person(s) Responsible (including Other Agencies): General Education Teacher, Special Education Teacher

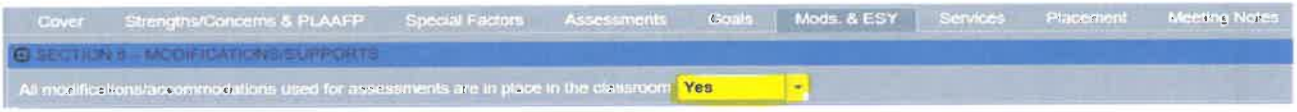
Eval Method:
- ☐ Test
- ☑ Data
- ☑ Work Samples
- ☑ Grade
- ☐ Observation
- ☐ Other

Frequency:
- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☑ Quarterly
- ☐ Semester
- ☐ Other

1. At least 1 "Evaluation Method" box must be checked
2. At least 1 "Frequency" box must be checked
3. All "Persons Responsible" for the Objective and Services must be named

G. Modification/Accommodations and ESY (Extended School Year)

Modifications/Accommodations



All modifications/accommodations used for assessments are in place in the classroom: Yes

1. An option must be chosen from the dropdown
   a. Question is whether accommodations used in assessments (noted in the Assessments tab) are in place in the classroom. Most often the answer should be Yes

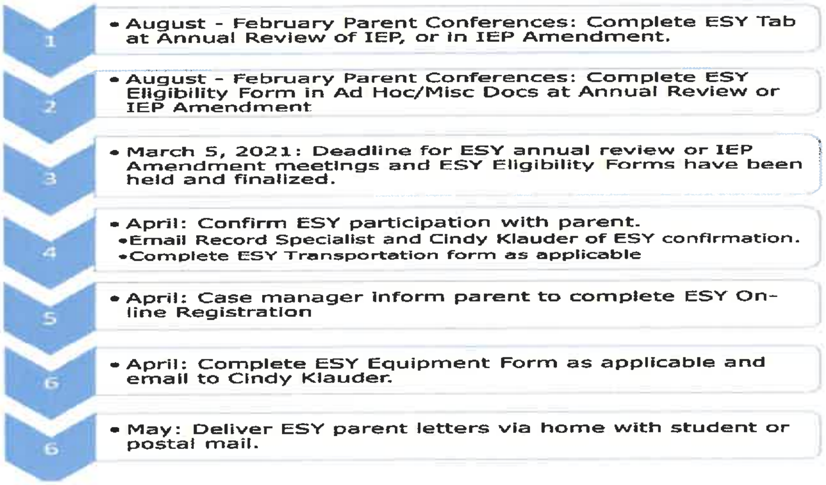
1. All 6 boxes must have an entry
   a. The highlighted dropdowns contain note library statements Case Managers may use
   b. Sometimes none are needed for extracurricular/nonacademic activities. "N/A" cannot be used. "None Needed" or "None at this time" or some variation

ESY

Determine Eligibility

Student's IEP team should consider the following when determining ESY eligibility. Case manager will consult related service providers as appropriate for ESY eligibility in their respective area. School Psychologist will be included in team discussion for ESY eligibility. It is recommended that teams discuss eligibility **prior** to meeting with parents in order to have data ready for review at the meeting as well as have ESY Eligibility Form completed for signatures from related service providers as applicable and final signature from school psychologist.

ESY Targets



1
- August - February Parent Conferences: Complete ESY Tab at Annual Review of IEP, or in IEP Amendment.

2
- August - February Parent Conferences: Complete ESY Eligibility Form in Ad Hoc/Misc Docs at Annual Review or IEP Amendment

3
- March 5, 2021: Deadline for ESY annual review or IEP Amendment meetings and ESY Eligibility Forms have been held and finalized.

4
- April: Confirm ESY participation with parent.
- Email Record Specialist and Cindy Klauder of ESY confirmation.
- Complete ESY Transportation form as applicable

5
- April: Case manager inform parent to complete ESY On-line Registration

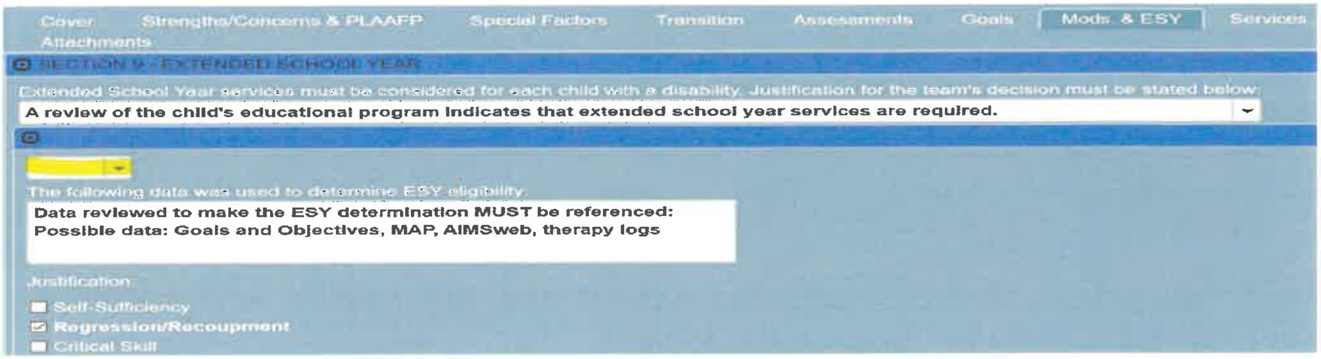
6
- April: Complete ESY Equipment Form as applicable and email to Cindy Klauder.

6
- May: Deliver ESY parent letters via home with student or postal mail.

Case Managers should contact the Resource Specialist for unique ESY situations

AFTER February Parent Conferences:

- Case Managers contact the Asst. Director of Student Support to add students for ESY



SECTION 9 - EXTENDED SCHOOL YEAR

Extended School Year services must be considered for each child with a disability. Justification for the team's decision must be stated below:

A review of the child's educational program indicates that extended school year services are required.

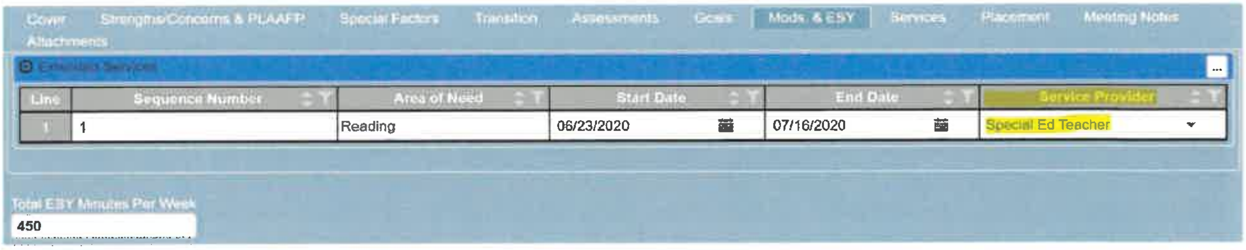
The following data was used to determine ESY eligibility:

Data reviewed to make the ESY determination MUST be referenced:
Possible data: Goals and Objectives, MAP, AIMSweb, therapy logs

Justification

☐ Self-Sufficiency
☑ Regression/Recoupment
☐ Critical Skill

1. A determination must be chosen from the dropdown
   a. If **"Not Required"**, data used to make the determination **must be stated** (The highlighted is a pre-loaded note library)
   b. If **"Required"**, further fields will pop up when Saved
      i. Data used to make the determination **must be stated**
      ii. At least 1 Eligibility Category must be checked



Extended Services

Line	Sequence Number	Area of Need	Start Date	End Date	Service Provider
1	1	Reading	06/23/2020	07/16/2020	Special Ed Teacher

Total ESY Minutes Per Week

450

      iii. The Extended Services "Areas of Need" will auto-populate from the Goal section
      iv. Dates of ESY should auto-populate, but fields are editable if incorrect
      v. Case Manager must identify the intended Service Provider from the dropdown on the right, for each Area of Need
      vi. Typically students receive 450 minutes of service per week, including Transportation (field auto-populates, but is editable)
         a. For Speech-Only students who will receive itinerant services: the ESY Minutes box is left blank (the summer team determines minutes and schedules with Parents)

❖ Sample completed ESY section, student is eligible:

SECTION 9 - EXTENDED SCHOOL YEAR

Extended School Year services must be considered for each child with a disability. Justification for the team's decision must be stated below:

☑ A review of the child's educational program indicates that extended school year services are required.

Service Area	Start Date	End Date	Provider
Reading	06/23/2020	07/16/2020	Special Ed Teacher

[redacted]is eligible for site based extended school year for the school year based upon Justification - Regression/Recoupment .

The following data was used to determine ESY eligibility:

Data reviewed to make the ESY determination MUST be referenced:
Possible data: Goals and Objectives, MAP, AIMSweb, therapy logs

Total ESY Service Minutes: 450.

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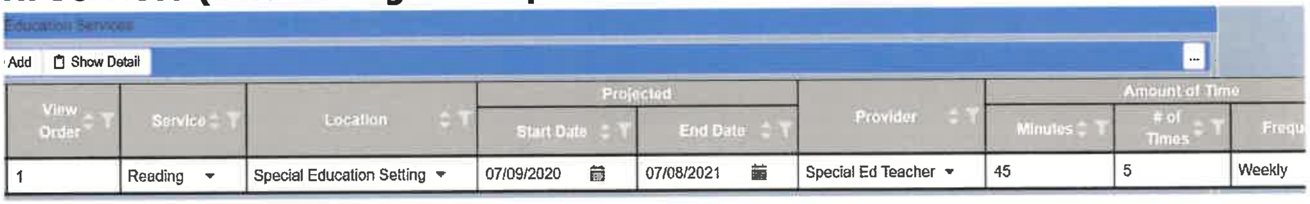
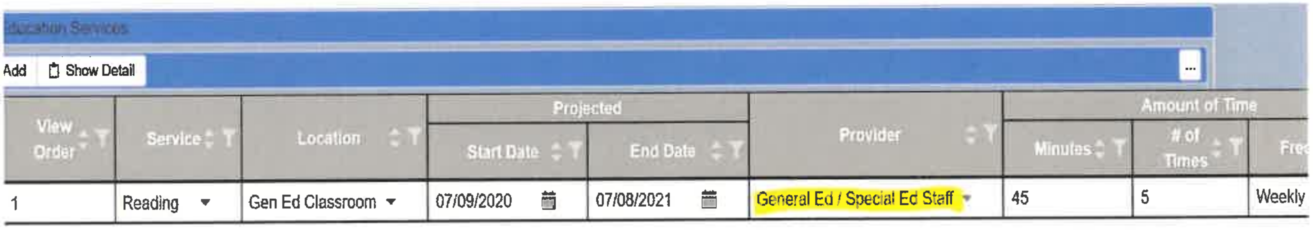
H. Services (Service Page Examples...



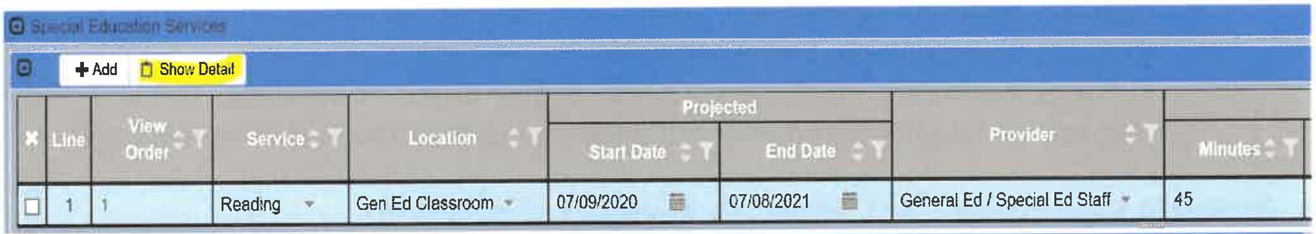
View Order	Service	Location	Projected		Provider	Amount of Time		
			Start Date	End Date		Minutes	# of Times	Frequ
1	Reading	Special Education Setting	07/09/2020	07/08/2021	Special Ed Teacher	45	5	Weekly

1. Each Present Level area that has a corresponding Goal requires service minutes
2. Lines are added by using the +Add button
   a. Service Area is chosen from the dropdown
   b. Location of the service is identified from the dropdown
   c. Service dates are entered (should match the dates on the IEP Cover page)
   d. Staff providing the service is identified by the dropdown
      i. ***Staff/Employer*** **is only for post high school students**, who are participating in programs such as Next Step or Project Search
   e. Minutes, # of Times, and Frequency of service are required

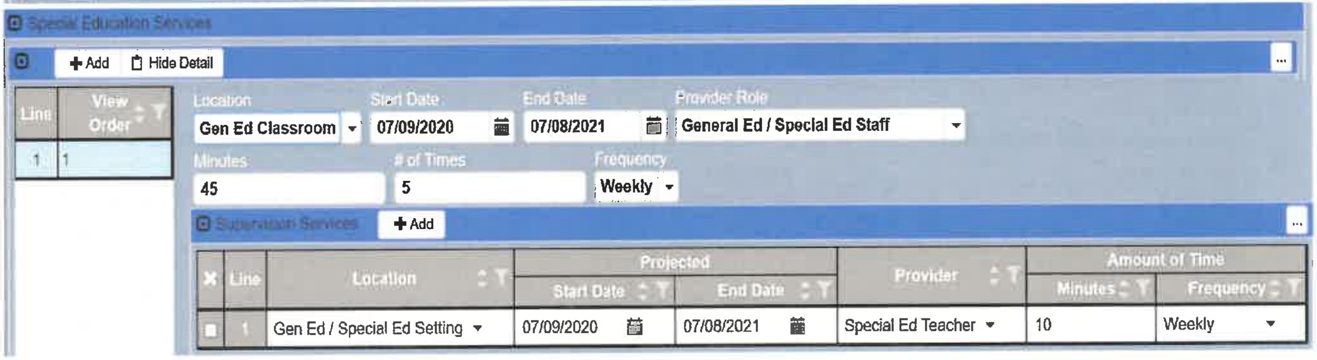


View Order	Service	Location	Projected		Provider	Amount of Time		
			Start Date	End Date		Minutes	# of Times	Fre
1	Reading	Gen Ed Classroom	07/09/2020	07/08/2021	General Ed / Special Ed Staff	45	5	Weekly

*If a service is not provided directly by a certified staff member (Special Ed Teacher, Speech Pathologist, Adapted PE, Teacher of the Visually Impaired), it must have a supervision component



✕	Line	View Order	Service	Location	Projected		Provider	Minutes
					Start Date	End Date		
☐	1	1	Reading	Gen Ed Classroom	07/09/2020	07/08/2021	General Ed / Special Ed Staff	45



Line	View Order
1	1

Location: Gen Ed Classroom
Start Date: 07/09/2020
End Date: 07/08/2021
Provider Role: General Ed / Special Ed Staff
Minutes: 45
# of Times: 5
Frequency: Weekly

✕	Line	Location	Projected		Provider	Amount of Time	
			Start Date	End Date		Minutes	Frequency
☐	1	Gen Ed / Special Ed Setting	07/09/2020	07/08/2021	Special Ed Teacher	10	Weekly

1. Supervision is entered by clicking the Line to turn it blue, then clicking Show Detail
   a. Supervision Location is identified from the dropdown
   b. Check to be sure Supervision dates match IEP service dates
   c. Certified Provider responsible for the Supervision is identified from the dropdown
   d. Minutes and Frequency are required

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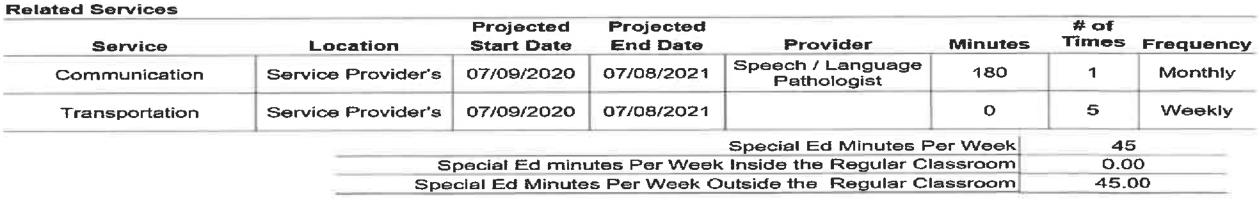
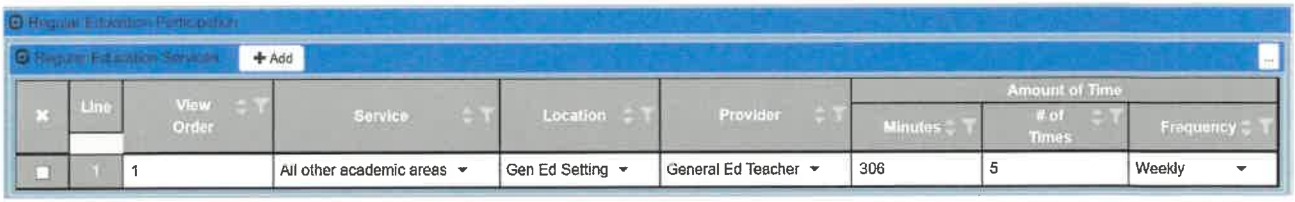


Related Services

Service	Location	Projected Start Date	Projected End Date	Provider	Minutes	# of Times	Frequency
Communication	Service Provider's	07/09/2020	07/08/2021	Speech / Language Pathologist	180	1	Monthly
Transportation	Service Provider's	07/09/2020	07/08/2021		0	5	Weekly

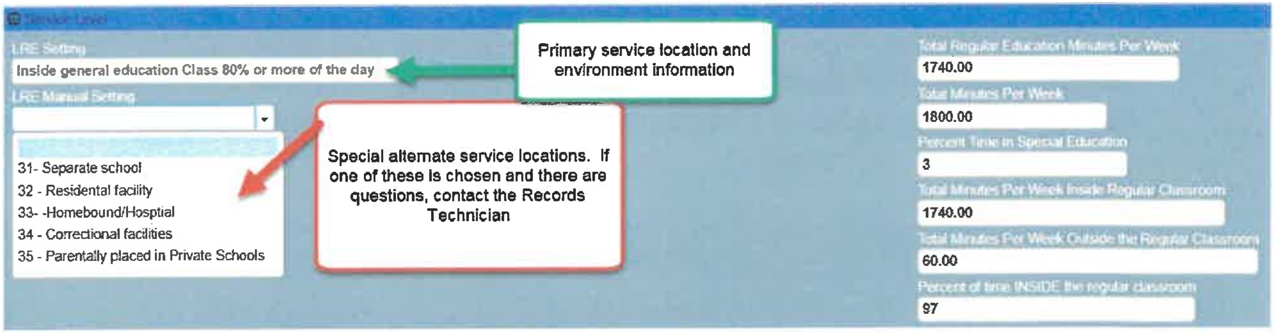
Special Ed Minutes Per Week	45
Special Ed minutes Per Week Inside the Regular Classroom	0.00
Special Ed Minutes Per Week Outside the Regular Classroom	45.00

1. Any qualifying Related Services are entered in the Related Services grid
   a. Service is picked from the dropdown
   b. Service location is identified from the dropdown
   c. Dates entered must match the dates on the IEP Cover page
   d. Provider is picked from the dropdown
      i. If the Related Service provider is overseeing a classroom program, the Provider may be the Sped Teacher or someone else. If so, a Supervision line is present (a Supervisory program, not "Consult". **Consult is no longer a service option**)
   e. Minutes, # of Times, and Frequency of service are required
2. If student qualifies for **Special Transportation** in the Special Factors section, the service must be listed in Related Services (**Minutes are zero)**



✖	Line	View Order	Service	Location	Provider	Amount of Time		
						Minutes	# of Times	Frequency
☐	1	1	All other academic areas	Gen Ed Setting	General Ed Teacher	306	5	Weekly

1. Any minutes that are not Special Ed or Related Service are entered into the Regular Education section, to account for the rest of the total minutes per week.



LRE Setting: Inside general education Class 80% or more of the day

Primary service location and environment information

31- Separate school
32 - Residental facility
33- -Homebound/Hosptial
34 - Correctional facilities
35 - Parentally placed in Private Schools

Special alternate service locations. If one of these is chosen and there are questions, contact the Records Technician

Total Regular Education Minutes Per Week: 1740.00
Total Minutes Per Week: 1800.00
Percent Time in Special Education: 3
Total Minutes Per Week Inside Regular Classroom: 1740.00
Total Minutes Per Week Outside the Regular Classroom: 60.00
Percent of time INSIDE the regular classroom: 97

1. Total minutes for students K-12 are typically 1800
   a. 4-day Preschool minutes typically total 600
   b. 5-day Preschool minutes typically total 750
   c. ASPIRE Preschool minutes typically total 1500
   d. Mat-Su Secondary School minutes typically total 1400
   e. Itinerant speech-only students minutes will only reflect the amount of speech services the student receives
   f. Other specialized District programs may have modified minutes, or students may have reduced minutes for other reasons. Contact your Case Manager.
2. The LRE (Least Restrictive Environment) fields are generated by the configuration and location of services, the student's age, and the program.

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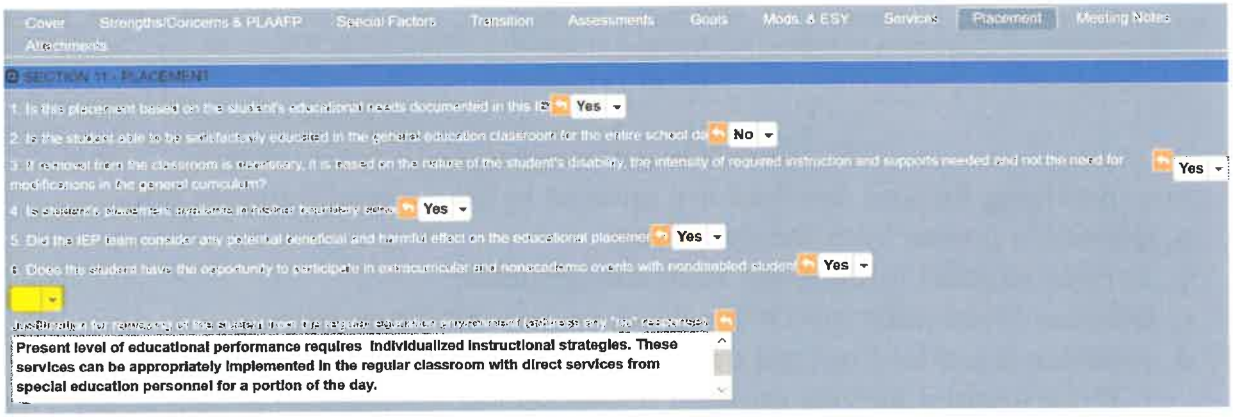
I. Placement


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
SECTION 11 - PLACEMENT

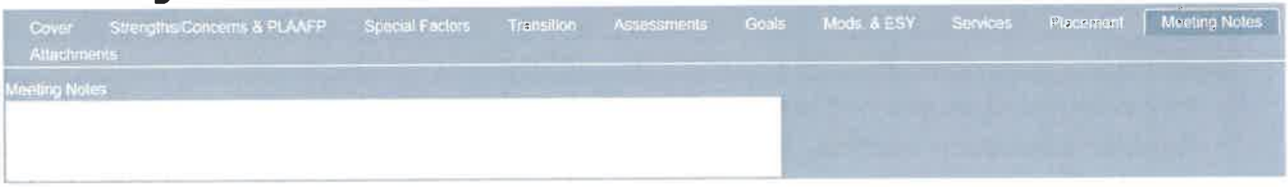
1. Is this placement based on the student's educational needs documented in this IE Yes
2. Is the student able to be satisfactorily educated in the general education classroom for the entire school da No
3. If removal from the classroom is necessary, it is based on the nature of the student's disability, the intensity of required instruction and supports needed and not the need for modifications in the general curriculum? Yes
4. [illegible] Yes
5. Did the IEP team consider any potential beneficial and harmful effect on the educational placeme Yes
6. Does this student have the opportunity to participate in extracurricular and nonacademic events with nondisabled student Yes

[illegible]

Present level of educational performance requires individualized instructional strategies. These services can be appropriately implemented in the regular classroom with direct services from special education personnel for a portion of the day.

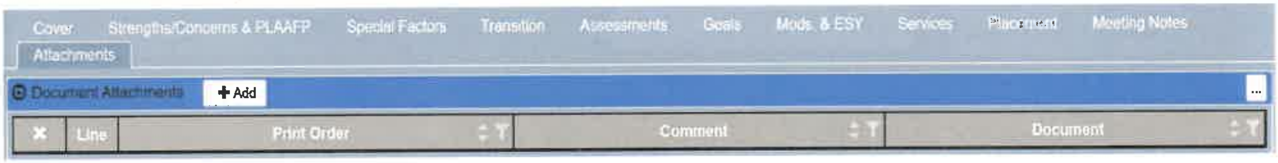
1. Each question must be answered
    a. If all answers are "Yes", the text box can be blank
    b. Any "No" responses must be justified in the text box
        i. The highlighted dropdown contains a library of standardized statements, or Case Managers can write their own
    c. "N/A" in questions 2 and 3 is only applicable to Preschool students. K-12 students must be answered Yes or No

J. Meeting Notes


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Meeting Notes

1. Notes from the IEP meeting are entered here
    a. Meeting notes for Amendments are entered above any existing meeting notes, and any sets of notes should reflect the meeting date they correspond with
    b. Any handwritten notes are returned to the Case Manager for the working file

K. Attachments


Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Document Attachments
+ Add
...
Line
Print Order
Comment
Document

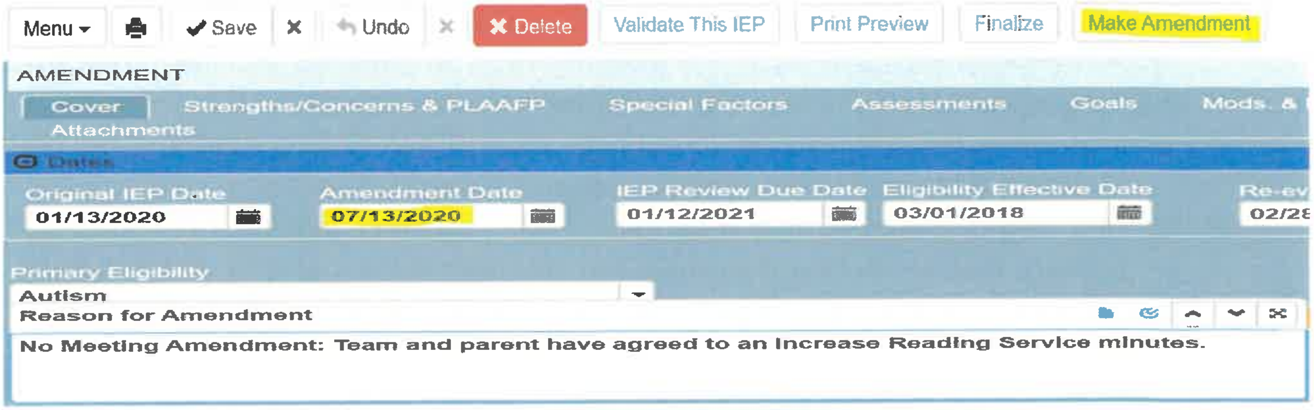
1. Only original signature pages from the IEP meeting are uploaded, using the +Add button
    a. IEP meeting team signature page
    b. Alternate Assessment signature page, if applicable
    c. FBA/BIP, if completed

Reviewing IEP Amendments

(Invitation and Written Notice within the Process can be used)

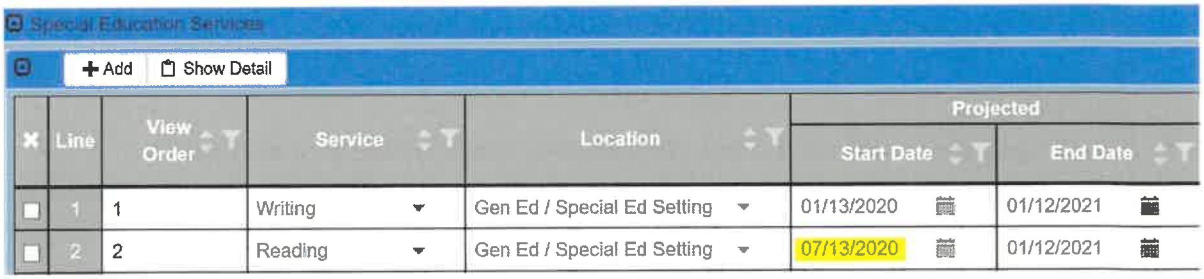
Student SE Record>SpEd Docs tab>Process Documents>IEP:

*****Case Manager will use the Make Amendment button to modify the IEP:***


Menu
Save
Undo
Delete
Validate This IEP
Print Preview
Finalize
Make Amendment
AMENDMENT
Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. &
Attachments
Dates

Original IEP Date: 01/13/2020
Amendment Date: 07/13/2020
IEP Review Due Date: 01/12/2021
Eligibility Effective Date: 03/01/2018
Re-ev: 02/28
Primary Eligibility: Autism
Reason for Amendment: No Meeting Amendment: Team and parent have agreed to an increase Reading Service minutes.

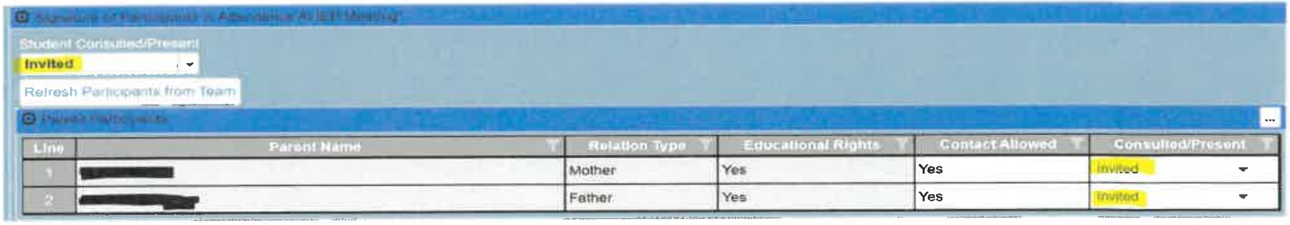
1. Amendment Date will auto-populate with the date Amendment is created. Can be changed manually if needed, to match meeting date, or date parent was contacted for a No Meeting Amendment
2. Reason for Amendment must be explained in the text box (state No Meeting)
3. Areas of the IEP are modified; see "Reviewing an IEP" for section-specific information


Special Education Services
Add
Show Detail

☒	Line	View Order	Service	Location	Projected	
					Start Date	End Date
☐	1	1	Writing	Gen Ed / Special Ed Setting	01/13/2020	01/12/2021
☐	2	2	Reading	Gen Ed / Special Ed Setting	07/13/2020	01/12/2021

1. If a service is modified/changed, the start date of that service is changed to match the date of the Amendment

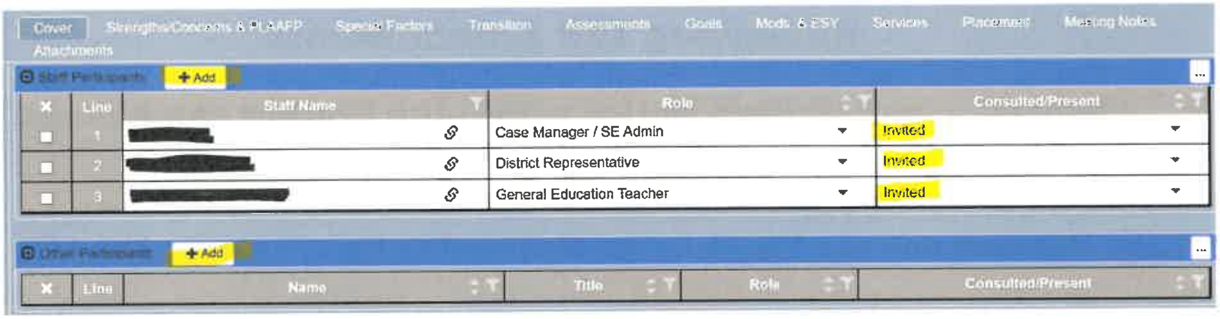
For Regular Amendment meeting:


Signature of Participants in Attendance At IEP Meeting
Refresh Participants from Team
Parent Participants

Student Consulted/Present: Invited

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	[redacted]	Mother	Yes	Yes	Invited
2	[redacted]	Father	Yes	Yes	Invited

1. Student Consulted/Present box should have "Invited" in the dropdown if aged 15+
2. Parent/Guardian information will auto-populate from the Student Information System
   a. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page

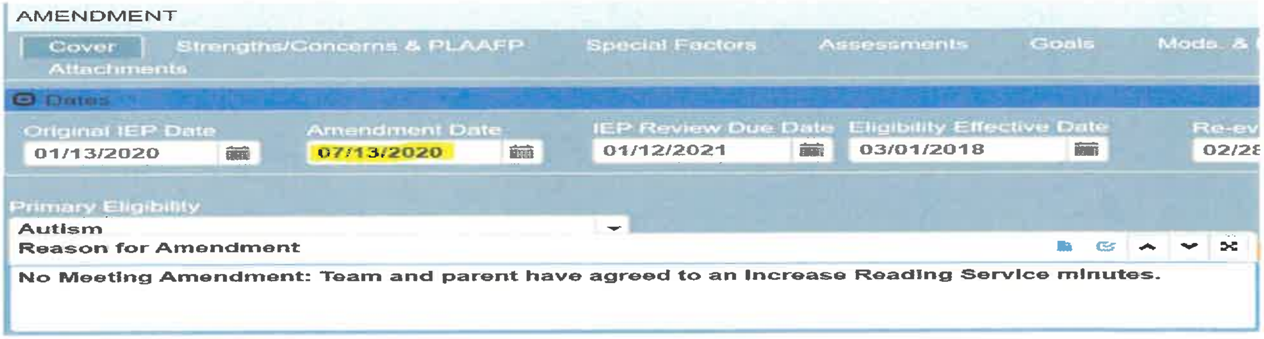

Cover
Strengths/Concerns & PLAAFP
Special Factors
Transition
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Staff Participants
+Add
Other Participants
+Add

✕	Line	Staff Name	Role	Consulted/Present
☐	1	[redacted]	Case Manager / SE Admin	Invited
☐	2	[redacted]	District Representative	Invited
☐	3	[redacted]	General Education Teacher	Invited

✕	Line	Name	Title	Role	Consulted/Present

1. Staff Names and Title/Role at the meeting must be entered and clearly indicated for meeting signatures (gridlines can be added by using the +Add button)
   a. Typically a meeting requires 3 primary roles: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
   b. This means a minimum of 3 persons. One person cannot fill more than one primary role a meeting (i.e. the Case Manager cannot also be District Rep)
   c. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page
2. Attendees from an outside agency, or any other participants, can be identified/added under the Other Participants grid, using the +Add button
3. Case Manager prints signature page and collects signatures at the meeting
4. Case Manager makes agreed upon changes to the IEP, and completes any items that flag from Validation
5. Records Specialist will review Amendment and Written Notice, and contact Case Manager for corrections or questions
6. Records Specialist will upload Amendment meeting team signature page to Attachments tab (Alternate Assessment signature page and FBA/BIP if done at the meeting)
7. Case Manager will Finalize the documents when review is complete
8. Records Specialist sends original signature page to Student Support Services

For a No Meeting Amendment (can be used to modify Testing Accommodations, Goals/Objectives, and Service Minutes only):

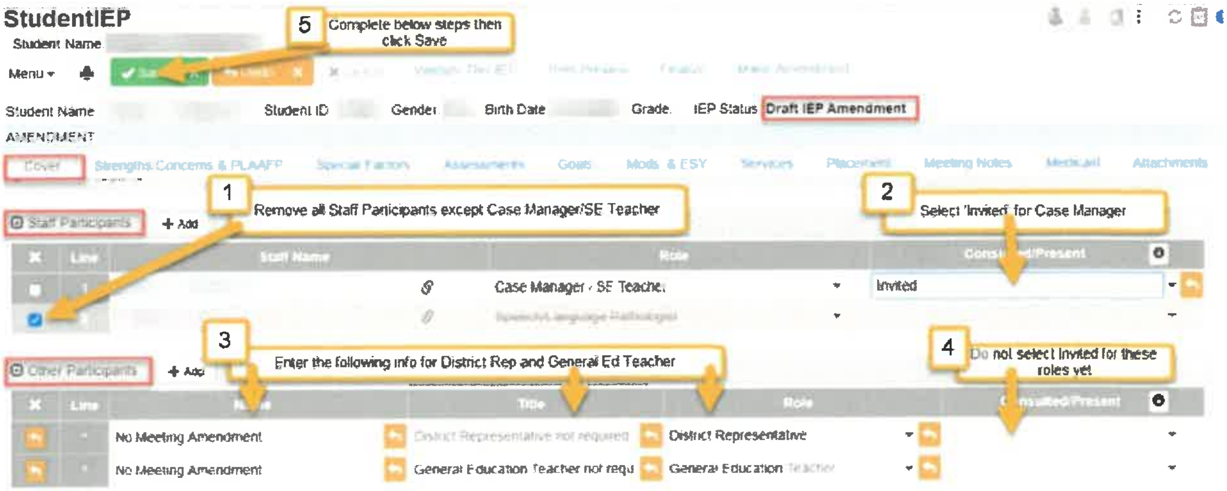

AMENDMENT
Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. &
Attachments
Dates

Original IEP Date: 01/13/2020
Amendment Date: 07/13/2020
IEP Review Due Date: 01/12/2021
Eligibility Effective Date: 03/01/2018
Re-ev: 02/28
Primary Eligibility: Autism
Reason for Amendment: No Meeting Amendment: Team and parent have agreed to an increase Reading Service minutes.

1. Amendment Date will auto-populate with the date Amendment is created. Can be changed manually if needed, to match meeting date
2. Reason for Amendment must be explained in the text box (state No Meeting)
3. Case Manager generates a signature page with only his/her signature and date
4. Case Manager makes agreed upon changes to the IEP, and completes any items that flag from Validation
5. Records Specialist will review Amendment and Written Notice, and contact Case Manager for corrections or questions
6. Records Specialist will upload Amendment signature page to Attachments tab
7. Case Manager will Finalize the documents when review is complete
8. Records Specialist will send original signature page to Student Support Services

❖ How to bypass Synergy SE "required signatures" validation for the No Meeting Amendment:

Complete the following participant directions to create the No Meeting Amendment signature page.


StudentIEP
Student Name
Menu
Student Name
Student ID
Gender
Birth Date
Grade
AMENDMENT
Cover
Strengths Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Medicaid
Attachments
Staff Participants
+ Add
Line
Staff Name
Role
Consulted/Present
Other Participants
+ Add
Line
Name
Title
Role
Consulted/Present

IEP Status: Draft IEP Amendment

5 Complete below steps then click Save

1 Remove all Staff Participants except Case Manager/SE Teacher

2 Select 'Invited' for Case Manager

3 Enter the following info for District Rep and General Ed Teacher

4 Do not select Invited for these roles yet

Staff Name	Role	Consulted/Present
	Case Manager - SE Teacher	Invited
	Speech/Language Pathologist	

Name	Title	Role	Consulted/Present
No Meeting Amendment	District Representative not required	District Representative	
No Meeting Amendment	General Education Teacher not requ	General Education Teacher	

Print preview and print the cover page of the IEP Amendment.

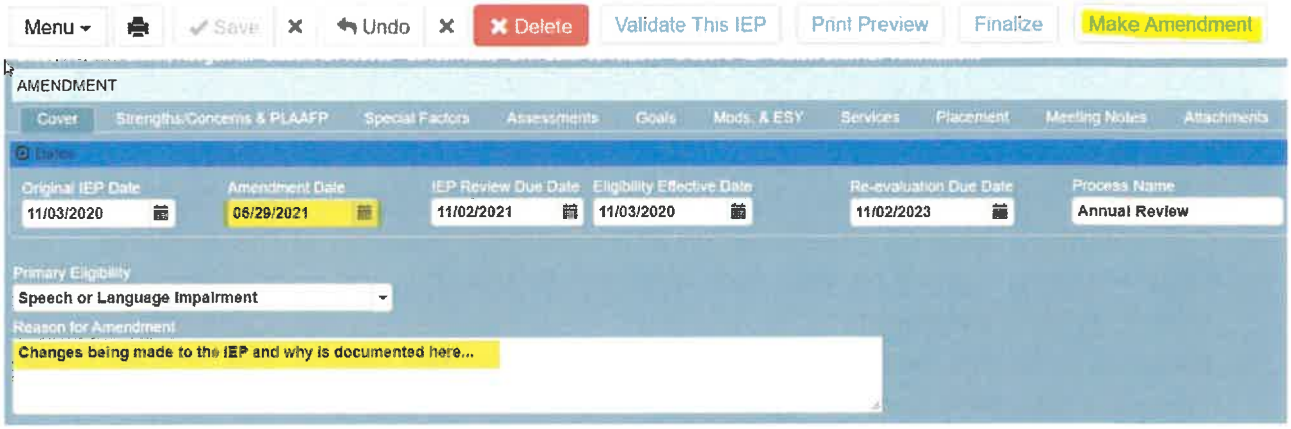
Reviewing a Change of Placement Amendment

(Invitation and Written Notice within the Process can be used)

- A Change of Placement team meeting is held for students moving between sites such as Mat-Su Day School and the boundary school. It is also used for students moving into/out of a more restrictive program within a school (i.e. Resource to Behavior Support/ABA)

Student SE Record>SpEd Docs tab>Process Documents>IEP

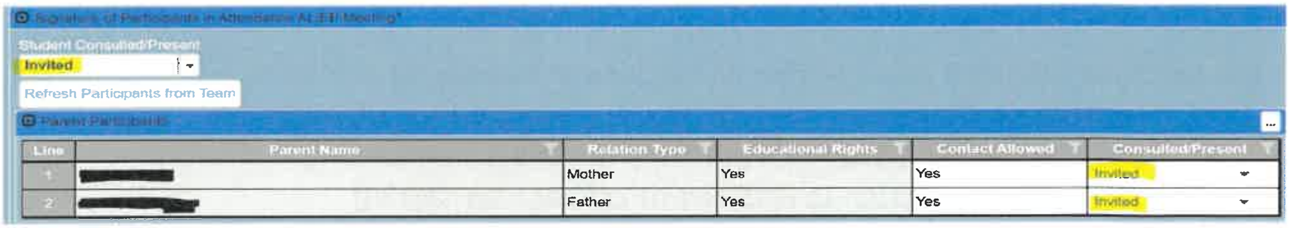
Case Manager will use the Make Amendment button to modify the IEP:


Menu
Save
Undo
Delete
Validate This IEP
Print Preview
Finalize
Make Amendment
Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Dates

AMENDMENT

Original IEP Date: 11/03/2020
Amendment Date: 06/29/2021
IEP Review Due Date: 11/02/2021
Eligibility Effective Date: 11/03/2020
Re-evaluation Due Date: 11/02/2023
Process Name: Annual Review
Primary Eligibility: Speech or Language Impairment
Reason for Amendment: Changes being made to the IEP and why is documented here...

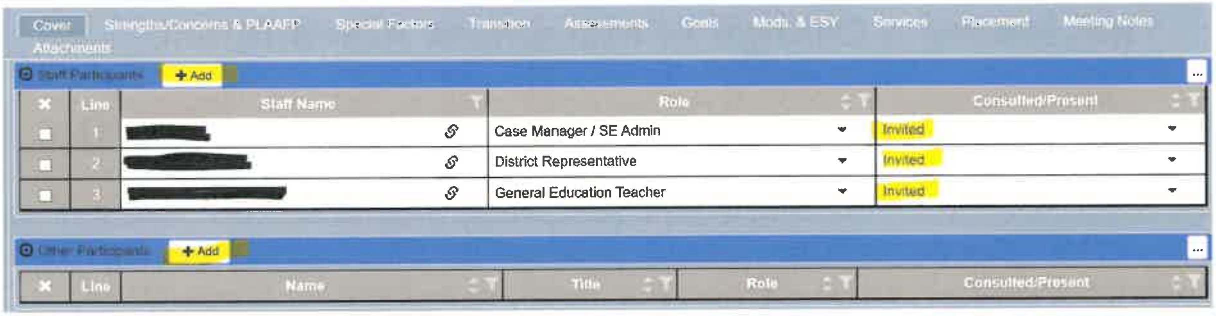
1. Amendment Date will auto-populate with the date Amendment is created. Can be changed manually if needed, to match meeting date
2. Reason for Amendment/student change of setting must be explained in the text box


Signatures of Participants in Attendance At IEP Meeting*
Refresh Participants from Team
Parent Participants

Student Consulted/Present: Invited

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	[redacted]	Mother	Yes	Yes	Invited
2	[redacted]	Father	Yes	Yes	Invited

1. Student Consulted/Present box should have "Invited" in the dropdown
2. Parent/Guardian information will auto-populate from the SIS.
    a. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page



✖	Line	Staff Name	Role	Consulted/Present
☐	1	[redacted]	Case Manager / SE Admin	Invited
☐	2	[redacted]	District Representative	Invited
☐	3	[redacted]	General Education Teacher	Invited

✖	Line	Name	Title	Role	Consulted/Present

1. Staff Names and Title/Role at the meeting must be entered and clearly indicated for meeting signatures (gridlines can be added by using the +Add button)
   a. Typically a meeting requires 3 primary roles: Case Manager/Special Ed Teacher, a District Representative, and a General Education Teacher
   b. This means a minimum of 3 persons. One person cannot fill more than one primary role a meeting (i.e. the Case Manager cannot also be District Rep)
   c. "Invited" must be picked from the Consulted/Present dropdown for names and signature lines to generate on the printed page
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5. Records Specialist will review Amendment and Written Notice, and contact Case Manager for corrections or questions
6. Records Specialist will upload Amendment meeting team signature page to Attachments tab
7. Case Manager will Finalize the documents when review is complete
8. Records Specialist sends original signature page to Student Support Services

❖ IEP Sections modified at a Change of Placement include, at a minimum:

- ESY Section Statement regarding year-round school (if applicable)
- Service minutes, Location, Providers to reflect new setting
- Placement description is updated to reflect new setting

ESY Eligibility and Timeline

Determine Eligibility

Student's IEP team should consider the following when determining ESY eligibility. Case manager will consult related service providers as appropriate for ESY eligibility in their respective area. School Psychologist will be included in team discussion for ESY eligibility. It is recommended that teams discuss eligibility **prior** to meeting with parents in order to have data ready for review at the meeting as well as have ESY Eligibility Form completed for signatures from related service providers as applicable and final signature from school psychologist.

- August - February Parent Conferences: Complete ESY Tab at Annual Review of IEP, or in IEP Amendment.
- August - February Prent Conferences: Complete ESY Eligibility Form in Ad Hoc/Misc Docs at Annual Reivew IEP Amendment

Both the IEP Section and Eligibility Form are completed

3 Friday prior to Spring: Deadline for ESY annual reivew or IEP Amendment meetings and ESY Eligibility Forms have been held and finalized.

4
- April: Confirm ESY participation with parent.
  - Email Record Specialist and Cindy Klauder of ESY confirmation.
  - Complete ESY Transportation form as applicable

5
- April: Case manager inform parent to complete ESY On-line Registration

6
- April: Complete ESY Equipment Form as applicable and email to Cindy Klauder.

6
- May: Deliver ESY parent letters via home with student or postal mail.

ESY Training Video (November 2020): https://drive.google.com/file/d/1d-7hTVZO8bTAUh4ym8VXm9mB1Fo8rWDz/view?usp=sharing

7/20/21

Kindergarten Transition Guide

2020-2021

This guide is designed to support Early Childhood Special Education Teams to complete Kindergarten Transition during the 4th quarter of the school year.

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Kindergarten Resource Specialists 2020-2021 18

Kindergarten Transitions – Components

Component 1: Timeline

- Kindergarten transitions are held in April or May. Seek approval from Adrian to hold any in March.
- You can hold all your meetings in 1 day or spread them out throughout the month.
    - Holding them in 1 day allows for more convenient sub planning for the kindergarten teacher and special education teacher that will be attending all your kindergarten amendments. It also helps related service providers when scheduling students that they may miss therapy sessions for.
    - Talk with your team/school for what will work best for your group of students.
- Complete COSF Exit for all students going to kindergarten.
- Due to Covid Mitigation Plans, all meetings should be held at your school for any students that will be attending a different elementary for kindergarten. Participants, as appropriate, from the receiving school can attend via zoom.
    - It is NOT required to invite participants from a receiving school.
    - It may be appropriate to invite receiving school staff for students in more restrictive programs (for example: ABA)
    - When in doubt, call Adrian.

Component 2: Types of Transition Meetings

- No Meeting Amendment:
    - SPEECH ONLY students
        - remove transportation and notify David that student will NOT be accessing special transportation in the fall
        - amend IEP to reflect kinder speech services. See attached paperwork directions.
    - Students in Head Start
        - amend IEP to reflect kinder speech services. See attached paperwork directions.
- IEP Amendment
    - All other students
        - remove all prek info and replace with kinder info.

            - This could be in modifications and supports, special factors>transportation, etc.
            - See attached paperwork directions.
        - Complete Transportation Form for students that will be accessing special transportation in the fall.
            - Notify David of any students that currently ride special transportation because of prek, but will not be accessing it in the fall.
- ESER/Annual review
    - Any student that is reviewing ESER results and writing an annual review can also hold their kindergarten transition meeting at the same time.
        - This is SUPER tricky paperwork wise. You will technically be holding the ESER and annual review. Then an IEP amendment for the kindergarten portion. Prepping the paperwork to do all 3 in 1 meeting could be a struggle.
        - Consider holding the ESER/IEP meeting, then the kindergarten transition at another time. Just a suggestion.

Component 3: Paperwork

- All transitions require the IEP to be amended to reflect the anticipated kindergarten minutes and to remove anything that addresses "preschool".
- Meeting participants for all kindergarten transition meetings (except no meeting amendments for SPEECH ONLY students)
    - Case Manager/SE Teacher (preschool teacher)
    - District Representative
        - Could be kindergarten Resource Specialist
        - Could be related service provider
        - Could be kindergarten special education teacher representative
    - Kindergarten General Education Teacher
        - Designated by school principal
    - Kindergarten special education teacher representative
        - Each school does this differently.
            - Some schools designate 1 special education teacher to attend all kindergarten transitions.
            - Some schools want the projected teacher to attend the applicable transitions.
    - Related service providers as appropriate
        - Recommend the current related service providers to attend

        - Recommend potential kindergarten related service providers attend
        - Please note, talk to your current and future related service providers. This is an amendment, not all related service providers may be available to attend all meetings. Teams should do their best to have a representative from the current team or future team attend as appropriate.
    - Parents must be invited and best practice is that they attend
- See "How To Kindergarten Transition Meeting Paperwork" for full details on completing paperwork

Component 4: Assessments/Data

- Provide the designated Kindergarten Special Ed Teacher with the following assessments as appropriate.
    - Brigance screener information – Fall/Winter/Spring as appropriate
    - STAR data as appropriate
        - STAR Profile
        - Level/program at the end of the school year
    - Heggerty spring EOY assessment
    - Communicate Social Emotional/Behavior/Adaptive skill data or specific tools student uses and their success rate (token board, visual schedule, choice board, calming strategies, zones of regulation, etc)
    - Other relevant information for the receiving team.
    - Optional "Kindergarten Transition Snapshot" page attached, but not required.

How To Kindergarten Transition SPEECH ONLY Student Paperwork

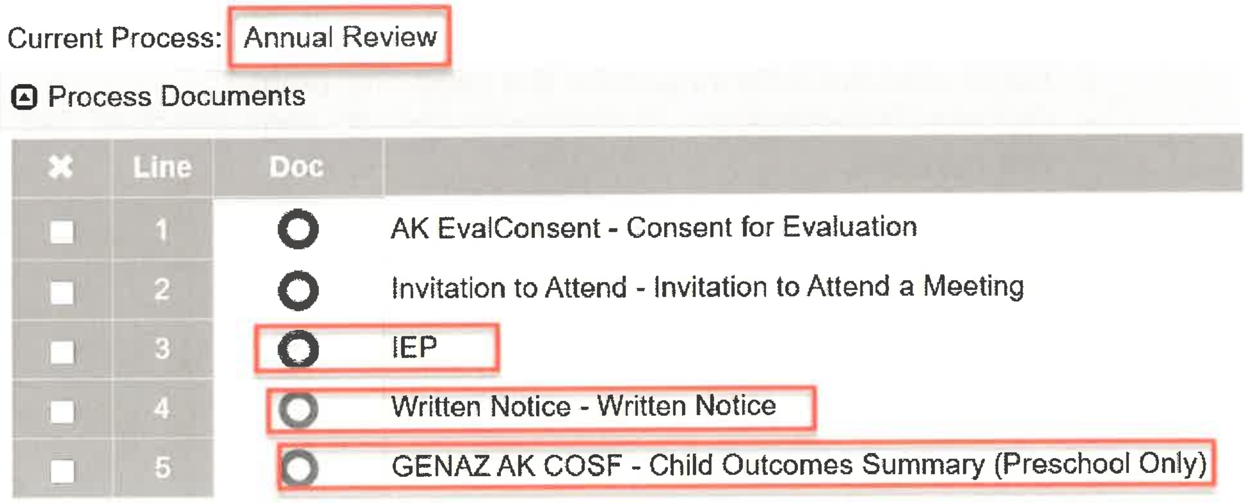
No Meeting Amendment

*You can do a No Meeting Amendment for the kindergarten transition for a SPEECH ONLY student.

*Preschool teacher and Speech Pathologist will:

- ➢ Determine who will contact parent to discuss kindergarten transition and seek approval from parent to conduct the kindergarten transition as a No Meeting Amendment.
- ➢ Determine who will complete the No Meeting Amendment paperwork.

1. Contact parent to seek approval for a No Meeting Amendment kindergarten transition.
    a. You are amending the IEP to reflect current preschool minutes for the remainder of this school year and to reflect the special education speech minutes for starting kindergarten.
2. Upon approval for the No Meeting Amendment:
    a. Make sure your student is in the Annual Review Process

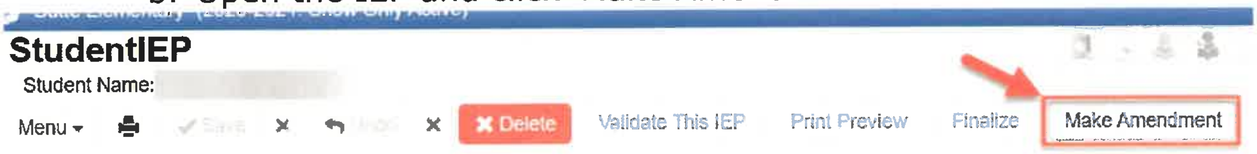


Current Process: Annual Review

Process Documents

✖	Line	Doc	
☐	1	○	AK EvalConsent - Consent for Evaluation
☐	2	○	Invitation to Attend - Invitation to Attend a Meeting
☐	3	○	IEP
☐	4	○	Written Notice - Written Notice
☐	5	○	GENAZ AK COSF - Child Outcomes Summary (Preschool Only)

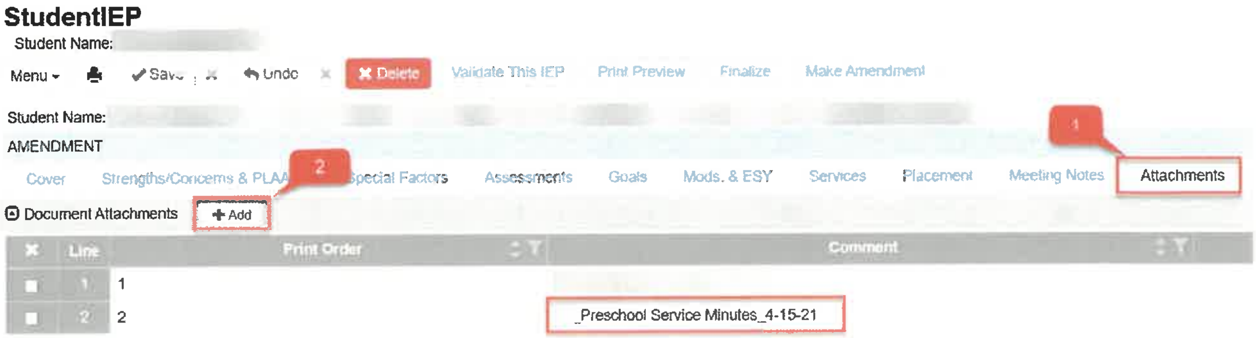
    b. Open the IEP and click ‘Make Amendment’ button



StudentIEP

Student Name: [redacted]

c. ***PRINT PREVIEW RIGHT AWAY and SAVE SERVICE MINUTES PAGE to your desktop or in a file on your computer.***
   - i. You will attach this page to Attachments in the IEP Amendment.
      1. Save with the following Naming Convention: FirstNameLetterLastNameLetter_Preschool Service Minutes_Date of Meeting (MM/DD/YYYY)
      2. For Example: AB_Preschool Service Minutes_04/15/21
   - ii. Doing this demonstrates the preschool minutes that will continue for the remainder of this school year.

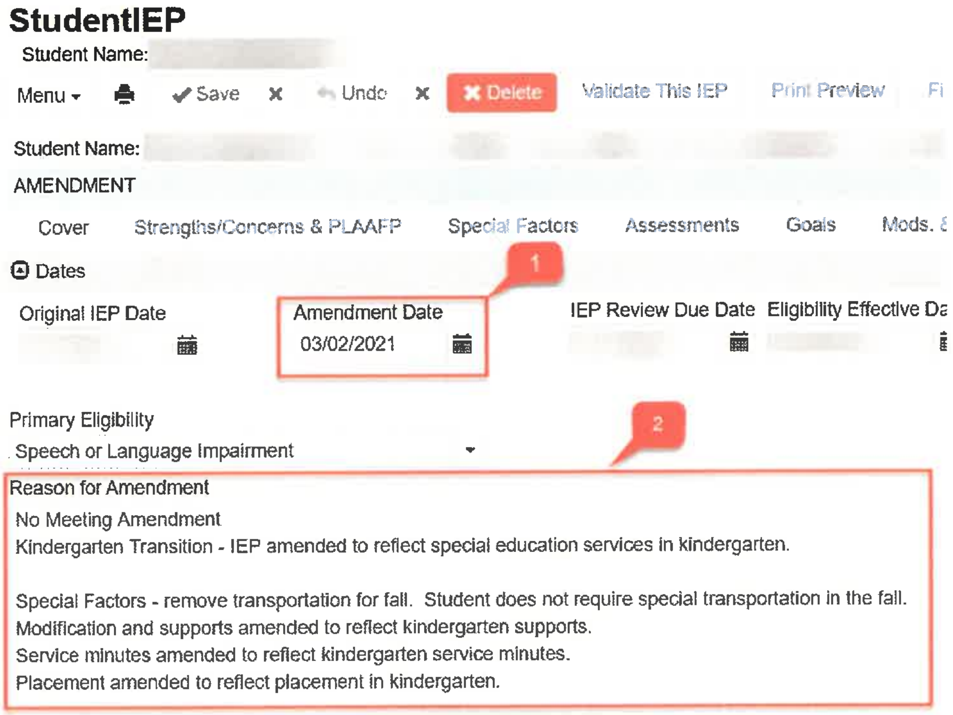

StudentIEP
Student Name:
Menu
Save
Undo
Delete
Validate This IEP
Print Preview
Finalize
Make Amendment
Student Name:
AMENDMENT
4
Cover
Strengths/Concerns & PLAA
2
Special Factors
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Document Attachments
Add
Line
Print Order
Comment
1
2

Line	Print Order	Comment
1	1	
2	2	_Preschool Service Minutes_4-15-21

d. Look through the IEP for any other areas that address Preschool.
   - i. Most IEP's will need to address the following sections of the IEP in the Amendment:
      1. Special Factors>Transportation
      2. Modifications and Supports
      3. Service Minutes
      4. Placement
   - ii. For example, Modifications and Supports often discusses supports in a preschool environment. This will need to be amended for kindergarten.
   - iii. ***Save any pages that will be amended.*** You will save these pages to your computer like you did for service minutes.
   - iv. Use the Naming convention as you did for service minutes.
      1. FirstNameLetterLastNameLetter_Preschool IEP Pages_Date of Meeting (MM/DD/YYYY)
   - v. Upload them to the Attachments Tab like you did for Service Minutes.

   e. Once you have identified any part of the IEP that needs to be amended, AND you have saved these pages to your computer, AND you have attached them to the IEP Amendment; you are ready to amend the IEP.

3. Cover Tab
   a. Amendment Date field: Enter the date that you spoke to the parent
   b. Reason for Amendment field: Enter the areas you are going to amend.
      i. See screenshot for an example


StudentIEP
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Validate This IEP
Print Preview
Fi
Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. &
Dates
1
2

Student Name: [redacted]

Student Name: [redacted]

AMENDMENT

Original IEP Date [redacted]

Amendment Date 03/02/2021

IEP Review Due Date [redacted]

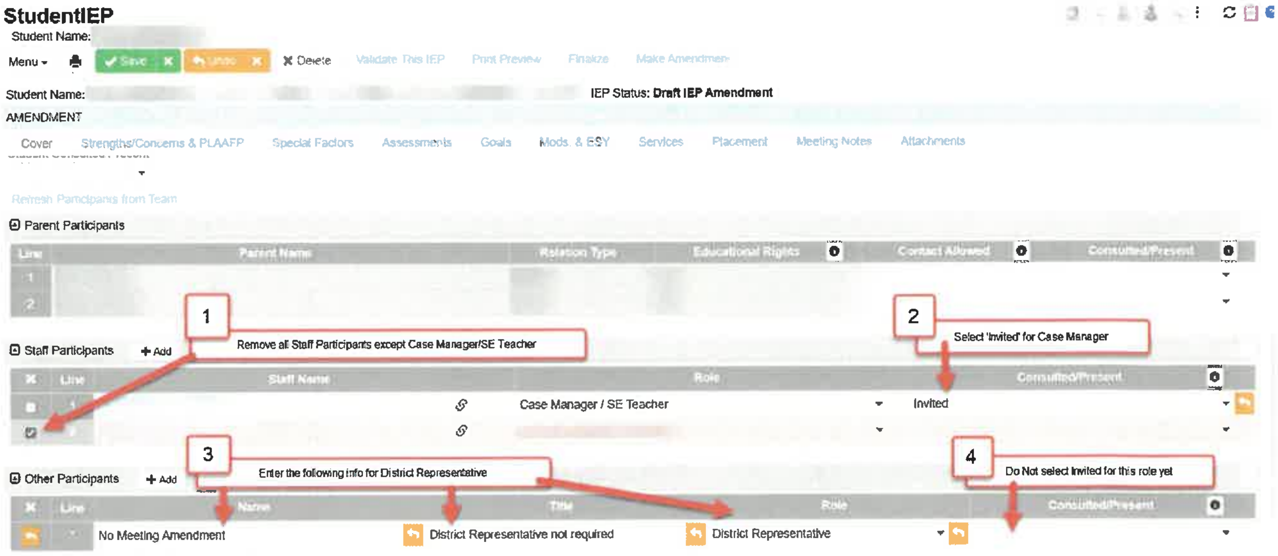
Eligibility Effective Da [redacted]

Primary Eligibility
Speech or Language Impairment

Reason for Amendment
No Meeting Amendment
Kindergarten Transition - IEP amended to reflect special education services in kindergarten.

Special Factors - remove transportation for fall. Student does not require special transportation in the fall.
Modification and supports amended to reflect kindergarten supports.
Service minutes amended to reflect kindergarten service minutes.
Placement amended to reflect placement in kindergarten.

   c. Participants fields: Complete the following then Save.



Student Name: [redacted]

IEP Status: **Draft IEP Amendment**

AMENDMENT

Parent Participants

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	[redacted]	[redacted]	[redacted]		
2	[redacted]	[redacted]	[redacted]		

1 Remove all Staff Participants except Case Manager/SE Teacher

2 Select 'Invited' for Case Manager

Staff Participants

✕	Line	Staff Name	Role	Consulted/Present
☐	1	[redacted]	Case Manager / SE Teacher	Invited
☑	2	[redacted]	[redacted]	

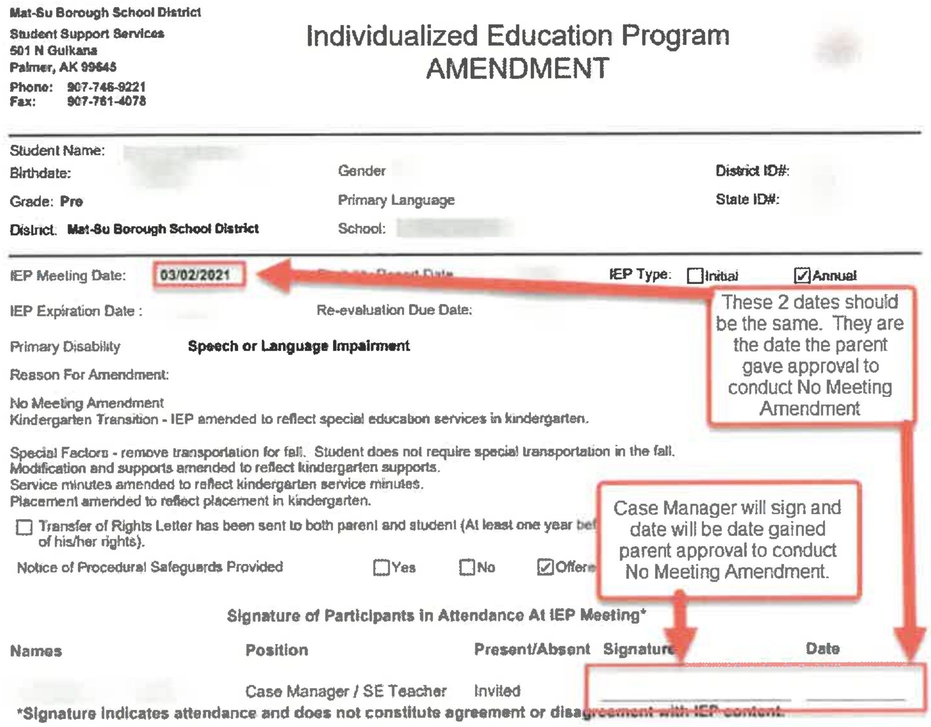
3 Enter the following info for District Representative

4 Do Not select Invited for this role yet

Other Participants

✕	Line	Name	Title	Role	Consulted/Present
		No Meeting Amendment	District Representative not required	District Representative	

d. Print Preview and Print the cover page for signature.



Mat-Su Borough School District
Student Support Services
501 N Gulkana
Palmer, AK 99645
Phone: 907-746-9221
Fax: 907-761-4078

Individualized Education Program
AMENDMENT

Student Name: [redacted]
Birthdate: [redacted]
Gender
District ID#:
Grade: **Pre**
Primary Language
State ID#:
District: **Mat-Su Borough School District**
School: [redacted]

IEP Meeting Date: **03/02/2021**
IEP Type: ☐ Initial ☑ Annual
IEP Expiration Date :
Re-evaluation Due Date:

These 2 dates should be the same. They are the date the parent gave approval to conduct No Meeting Amendment

Primary Disability **Speech or Language Impairment**

Reason For Amendment:

No Meeting Amendment
Kindergarten Transition - IEP amended to reflect special education services in kindergarten.

Special Factors - remove transportation for fall. Student does not require special transportation in the fall.
Modification and supports amended to reflect kindergarten supports.
Service minutes amended to reflect kindergarten service minutes.
Placement amended to reflect placement in kindergarten.

☐ Transfer of Rights Letter has been sent to both parent and student (At least one year bef of his/her rights).

Notice of Procedural Safeguards Provided ☐ Yes ☐ No ☑ Offere

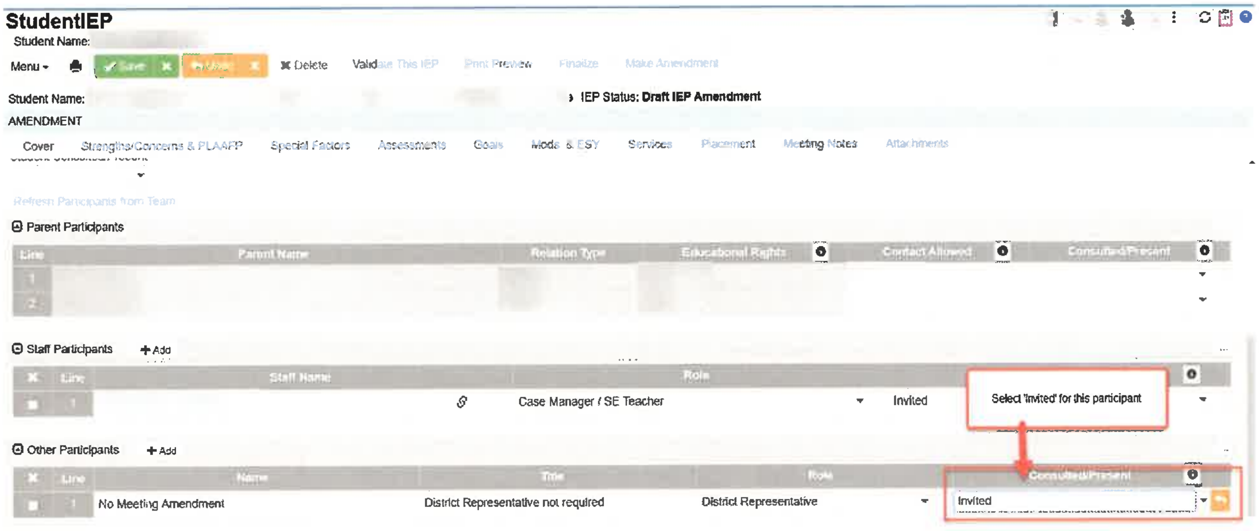
Case Manager will sign and date will be date gained parent approval to conduct No Meeting Amendment.

Signature of Participants in Attendance At IEP Meeting*

Names	Position	Present/Absent	Signature	Date
[redacted]	Case Manager / SE Teacher	Invited		

***Signature indicates attendance and does not constitute agreement or disagreement with IEP content.**

e. Upload signed page to Attachments Tab in IEP with Naming Convention
    i. FirstNameLetterLastNameLetter_NMA Sig Page_Date of Meeting (MM/DD/YYYY)
f. Return to Cover Tab and complete following field then Save


StudentIEP
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Print Preview
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Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods & ESY
Services
Placement
Meeting Notes
Attachments
Refresh Participants from Team
Parent Participants
Staff Participants
Add
Other Participants
Add

Student Name: [redacted]

Student Name: [redacted]

IEP Status: **Draft IEP Amendment**

AMENDMENT

Parent Participants

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	[redacted]	[redacted]	[redacted]		
2	[redacted]	[redacted]	[redacted]		

Staff Participants

✕	Line	Staff Name	Role	
☐	1	[redacted]	Case Manager / SE Teacher	Invited

Other Participants

✕	Line	Name	Title	Role	Consulted/Present
☐	1	No Meeting Amendment	District Representative not required	District Representative	Invited

Select 'Invited' for this participant

4. Amend areas in IEP to reflect kindergarten services.
5. Draft a Written Notice and finalize.
    a. Written Notice date should be same as the Meeting date of IEP Amendment.
6. Complete COSF Exit form and finalize.
7. Finalize IEP No Meeting Amendment
8. Be sure to provide parent with copy of IEP Amendment and Written Notice.

How To Kindergarten Transition Meeting Paperwork

IEP Amendment

*You can NOT do a No Meeting Amendment for the kindergarten transition for a student that is eligible for more than just speech only.

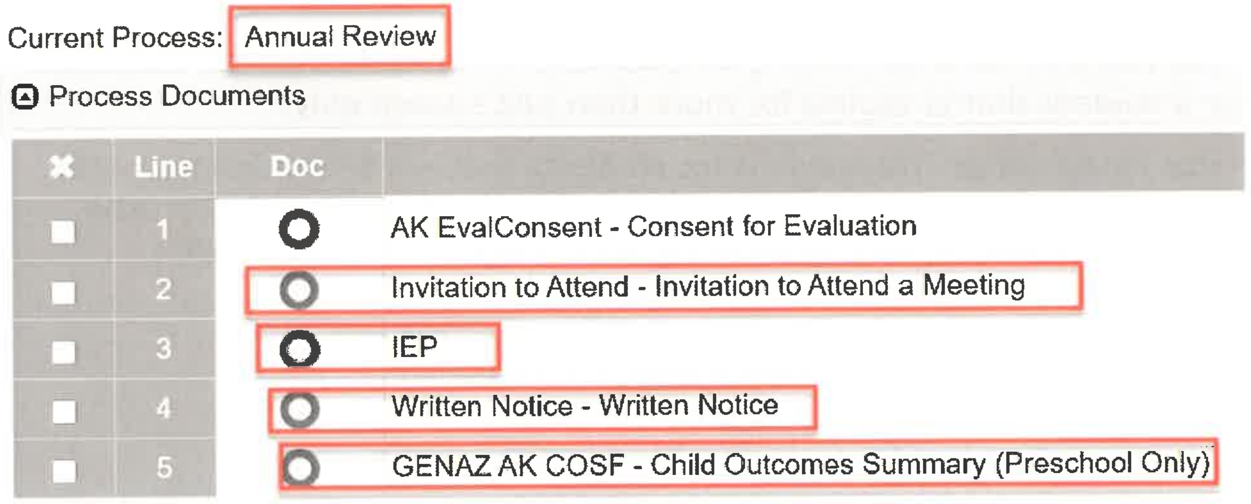
*This Kindergarten Transition is for students that will be accessing special education services through a Resource, Intensive Resource, BSP or ABA program. Students may or may not have related services as well.

*These meetings MUST include the following participants

- Case Manager/SE Teacher (preschool teacher)
- District Representative
    - Could be kindergarten Resource Specialist
    - Could be related service provider
    - Could be kindergarten special education teacher representative
- Kindergarten General Education Teacher
    - Designated by school principal
- Kindergarten special education teacher representative
    - Each school does this differently.
        - Some schools designate 1 special education teacher to attend all kindergarten transitions.
        - Some schools want the projected teacher to attend the applicable transitions.
- Related service providers as appropriate
    - Recommend the current related service providers to attend
    - Recommend potential kindergarten related service providers attend
    - Please note, talk to your current and future related service providers. This is an amendment, not all related service providers may be available to attend all meetings. Teams should do their best to have a representative from the current team or future team attend as appropriate.
- Parents must be invited and best practice is that they attend

*These meetings may be held via Zoom and attendance should be documented for appropriate participation (attend via Zoom, or sign in person)

1. You will need to be in the Annual Review Process for this Amendment.



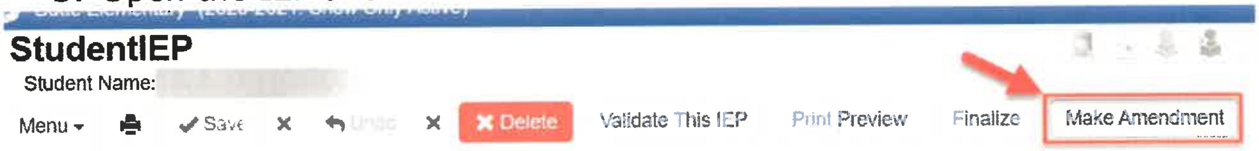
Current Process: Annual Review

Process Documents

✖	Line	Doc	
☐	1	○	AK EvalConsent - Consent for Evaluation
☐	2	○	Invitation to Attend - Invitation to Attend a Meeting
☐	3	○	IEP
☐	4	○	Written Notice - Written Notice
☐	5	○	GENAZ AK COSF - Child Outcomes Summary (Preschool Only)

2. Create Invitation

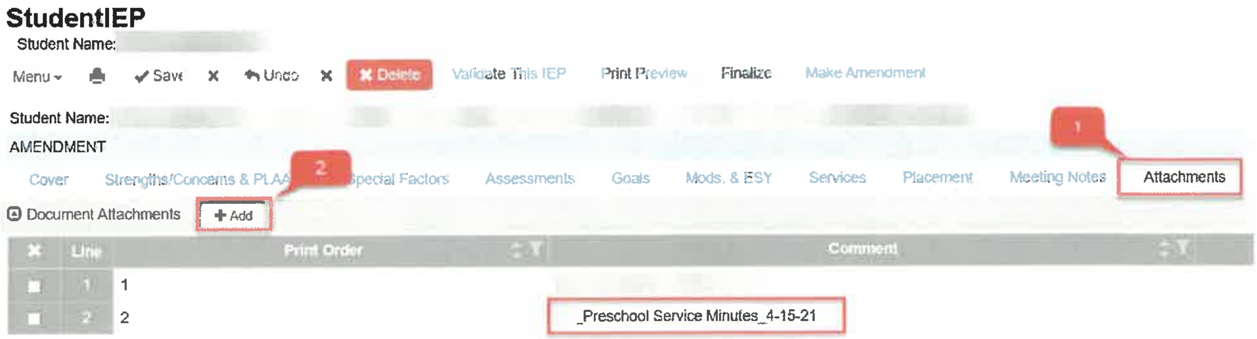
3. Open the IEP and click 'Make Amendment' button



StudentIEP

Student Name: [redacted]

   a. ***PRINT PREVIEW RIGHT AWAY and SAVE SERVICE MINUTES PAGE to your desktop or in a file on your computer.***
      i. You will attach this page to Attachments in the IEP Amendment.
         1. Save with the following Naming Convention: FirstNameLetterLastNameLetter_Preschool Service Minutes_Date of Meeting (MM/DD/YYYY)
         2. For Example: AB_Preschool Service Minutes_04/15/21
      ii. Doing this demonstrates the preschool minutes that will continue for the remainder of this school year.


StudentIEP
Menu
Save
Undo
Delete
Validate This IEP
Print Preview
Finalize
Make Amendment
1
2
Cover
Strengths/Concerns & PLAA
Special Factors
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Document Attachments
Add

Student Name: [redacted]

Student Name: [redacted]

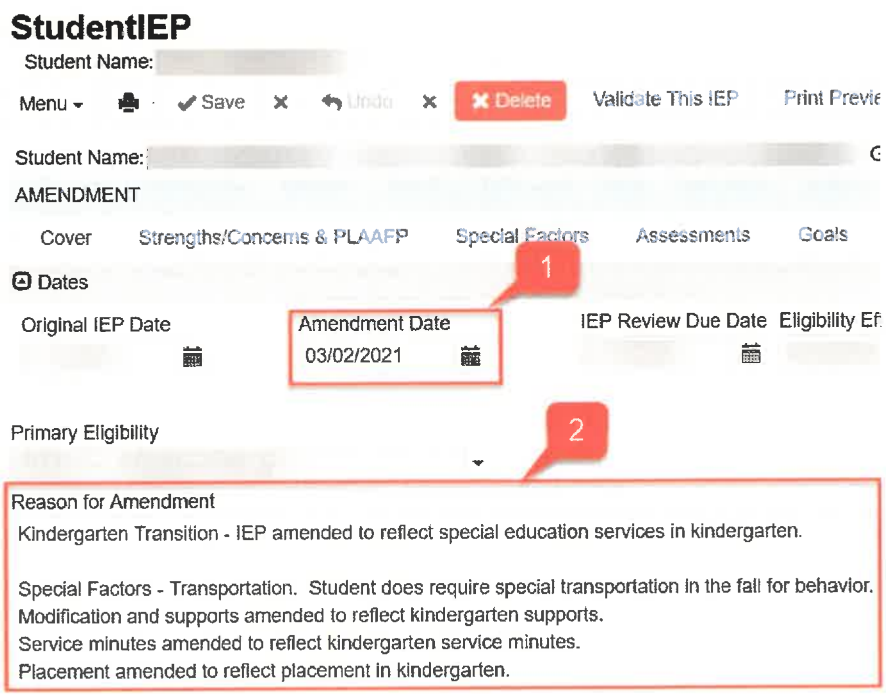
AMENDMENT

Line	Print Order	Comment
1	1	[redacted]
2	2	_Preschool Service Minutes_4-15-21

b. Look through the IEP for any other areas that address Preschool.
    i. Most IEP's will need to address the following sections of the IEP in the Amendment:
        1. Special Factors>Transportation
        2. Modifications and Supports
        3. Service Minutes
        4. Placement
    ii. For example, Modifications and Supports often discusses supports in a preschool environment. This will need to be amended for kindergarten.
    iii. ***Save any pages that will be amended.*** You will save these pages to your computer like you did for service minutes.
    iv. Use the Naming convention as you did for service minutes.
        1. FirstNameLetterLastNameLetter_Preschool IEP Pages_Date of Meeting (MM/DD/YYYY)
    v. Upload them to the Attachments Tab like you did for Service Minutes.

c. Once you have identified any part of the IEP that needs to be amended, **AND** you have saved these pages to your computer, **AND** you have attached them to the IEP Amendment; you are ready to amend the IEP.

9. Cover Tab
    a. Amendment Date field: Enter the date of the amendment meeting
    b. Reason for Amendment field: Enter the areas you are going to amend.
        i. See screenshot for an example



StudentIEP
Menu
Save
Undo
Delete
Validate This IEP
Print Previe
Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Dates
1
2

Student Name: [redacted]

Student Name: [redacted]

AMENDMENT

Original IEP Date

Amendment Date 03/02/2021

IEP Review Due Date

Eligibility Ef

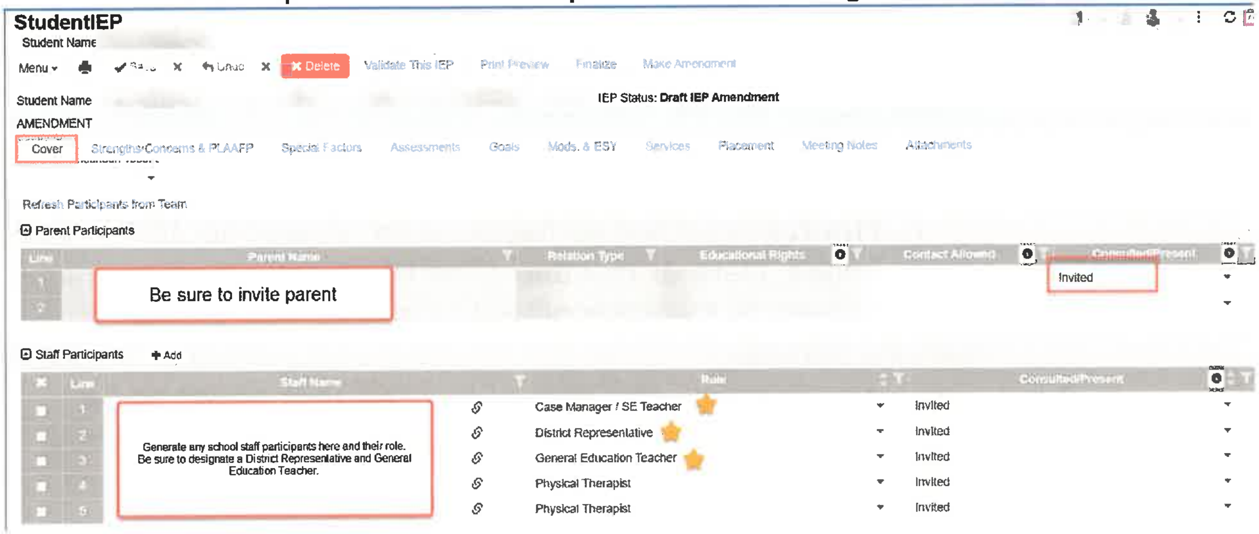
Primary Eligibility

Reason for Amendment

Kindergarten Transition - IEP amended to reflect special education services in kindergarten.

Special Factors - Transportation. Student does require special transportation in the fall for behavior.
Modification and supports amended to reflect kindergarten supports.
Service minutes amended to reflect kindergarten service minutes.
Placement amended to reflect placement in kindergarten.

c. Participants fields: Complete the following then Save.



StudentIEP
Menu
Save
Undo
Delete
Validate This IEP
Print Preview
Finalize
Make Amendment
Cover
Strengths/Concerns & PLAAFP
Special Factors
Assessments
Goals
Mods. & ESY
Services
Placement
Meeting Notes
Attachments
Refresh Participants from Team
Parent Participants
Staff Participants
Add

Student Name [redacted]

Student Name [redacted]

IEP Status: **Draft IEP Amendment**

AMENDMENT

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1					Invited
2					

Be sure to invite parent

Line	Staff Name	Role	Consulted/Present
1		Case Manager / SE Teacher	Invited
2		District Representative	Invited
3		General Education Teacher	Invited
4		Physical Therapist	Invited
5		Physical Therapist	Invited

Generate any school staff participants here and their role. Be sure to designate a District Representative and General Education Teacher.

d. Print Preview and Print the cover page for signatures.

10. Amend areas in IEP to reflect kindergarten services.
11. Draft a Written Notice at the end of your meeting. Finalize after meeting.
    a. Written Notice date should be same as the Meeting date of IEP Amendment.
12. Complete COSF Exit form and finalize after meeting.
13. Finalize IEP Amendment after meeting.

14. Create transportation form for starting in Kindergarten – ONLY for students that will be accessing special transportation in fall.
15. Be sure to provide parent with copy of IEP Amendment and Written Notice.

Kindergarten Transition Snapshot

Student:__________________________ Age:______ Birthday:________________

Eligibility: ________________ Annual due: ______________ 3 Year Due: ___________

Areas of Educational Need: ____

Strengths:

Learning Style:

	Can Do	Struggles with	Supports Used
Behavior			
Social Emotional			
Speech			

Adaptive Skills			
School Skills			

Other Information:

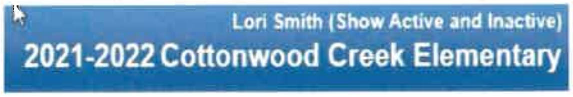
Kindergarten Resource Specialists 2020-2021

Amber Finley	Dena'ina
Amy Tucker	Cottonwood Finger Lake Meadow Lakes Willow BirchTree Charter
Kelly McBride	Big Lake Butte Iditarod Larson Machetanz Shaw Tanaina Trapper Creek Talkeetna
Marti Mackinnon	Glacier View Goose Bay Midnight Sun Pioneer Peak Snowshoe Sutton Swanson
Tesa Bunsen	ABA – Finger Lake Larson Snowshoe Meadow Lakes Structured Learning-Shaw

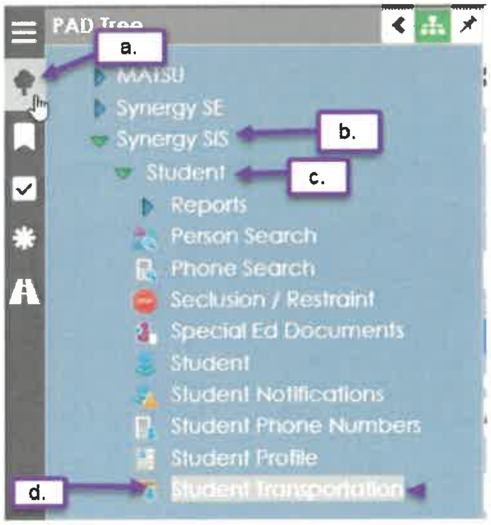
FY22 Transportation Requests

- **Requests must be submitted to Transportation by Friday at 11am for services to begin the following Wednesday**

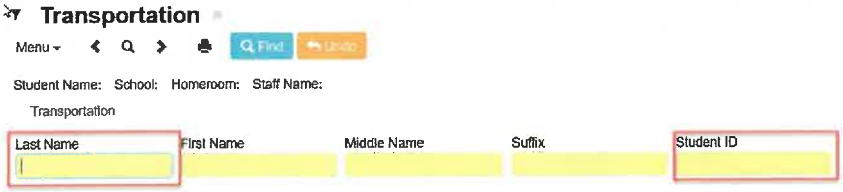
1. Check that the Focus is set to the location where the student is **currently** enrolled:


Lori Smith (Show Active and Inactive)
2021-2022 Cottonwood Creek Elementary

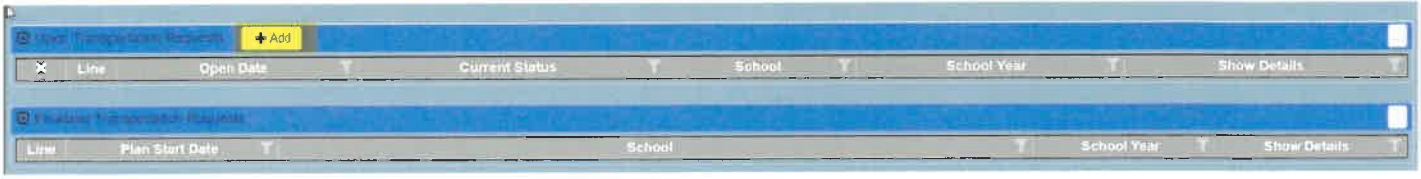
2. Click:
    a. PAD Tree menu on the left side of the Synergy screen
    b. Select Synergy SIS
    c. Select Student
    d. Select Student Transportation


PAD Tree
a.
MATSU
Synergy SE
Synergy SIS
b.
Student
c.
Reports
Person Search
Phone Search
Seclusion / Restraint
Special Ed Documents
Student
Student Notifications
Student Phone Numbers
Student Profile
d.
Student Transportation

3. Search Student by name or student ID:

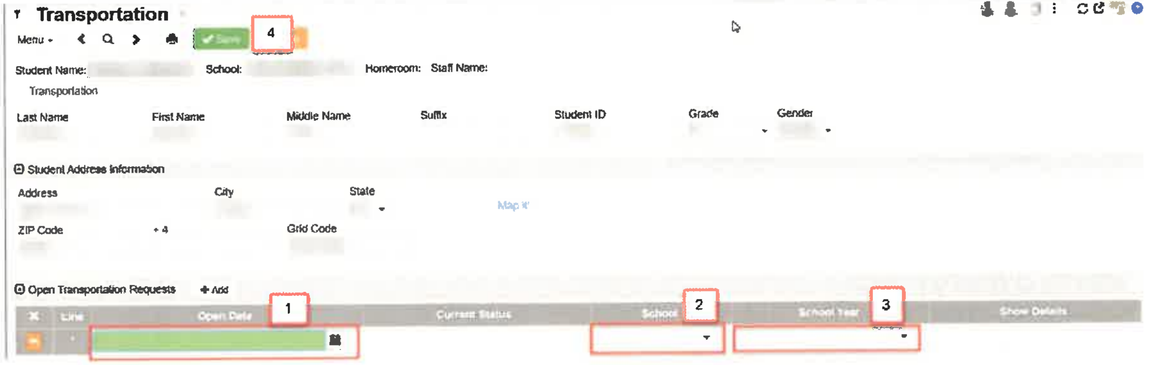

Transportation
Menu
Find
Undo
Student Name: School: Homeroom: Staff Name:
Transportation
Last Name
First Name
Middle Name
Suffix
Student ID

4. Click the +Add button next to the Open Transportation Requests:


+ Add
Line
Open Date
Current Status
School
School Year
Show Details
Line
Plan Start Date
School
School Year
Show Details

7/20/21

5. Open Date (insert today's date), the school the student will be transported to and from, and the appropriate school year. Click Save:



Transportation

Menu ▾ ‹ 🔍 › 🖨 ✔ Save 4

Student Name: [redacted] School: [redacted] Homeroom: Staff Name:

Transportation

Last Name	First Name	Middle Name	Suffix	Student ID	Grade	Gender
[redacted]	[redacted]	[redacted]		[redacted]	[redacted]	[redacted]

⊟ Student Address Information

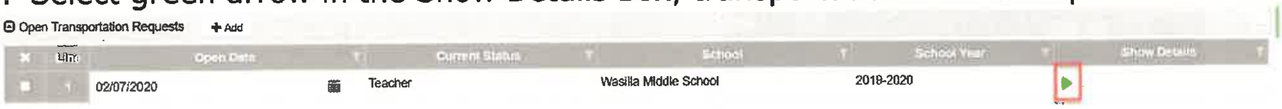
Address	City	State	
[redacted]	[redacted]	[redacted]	Map ↗

ZIP Code	+ 4	Grid Code
[redacted]		[redacted]

⊟ Open Transportation Requests ✚ Add

✖	Line	Open Date 1	Current Status	School 2	School Year 3	Show Details
				▾	▾	

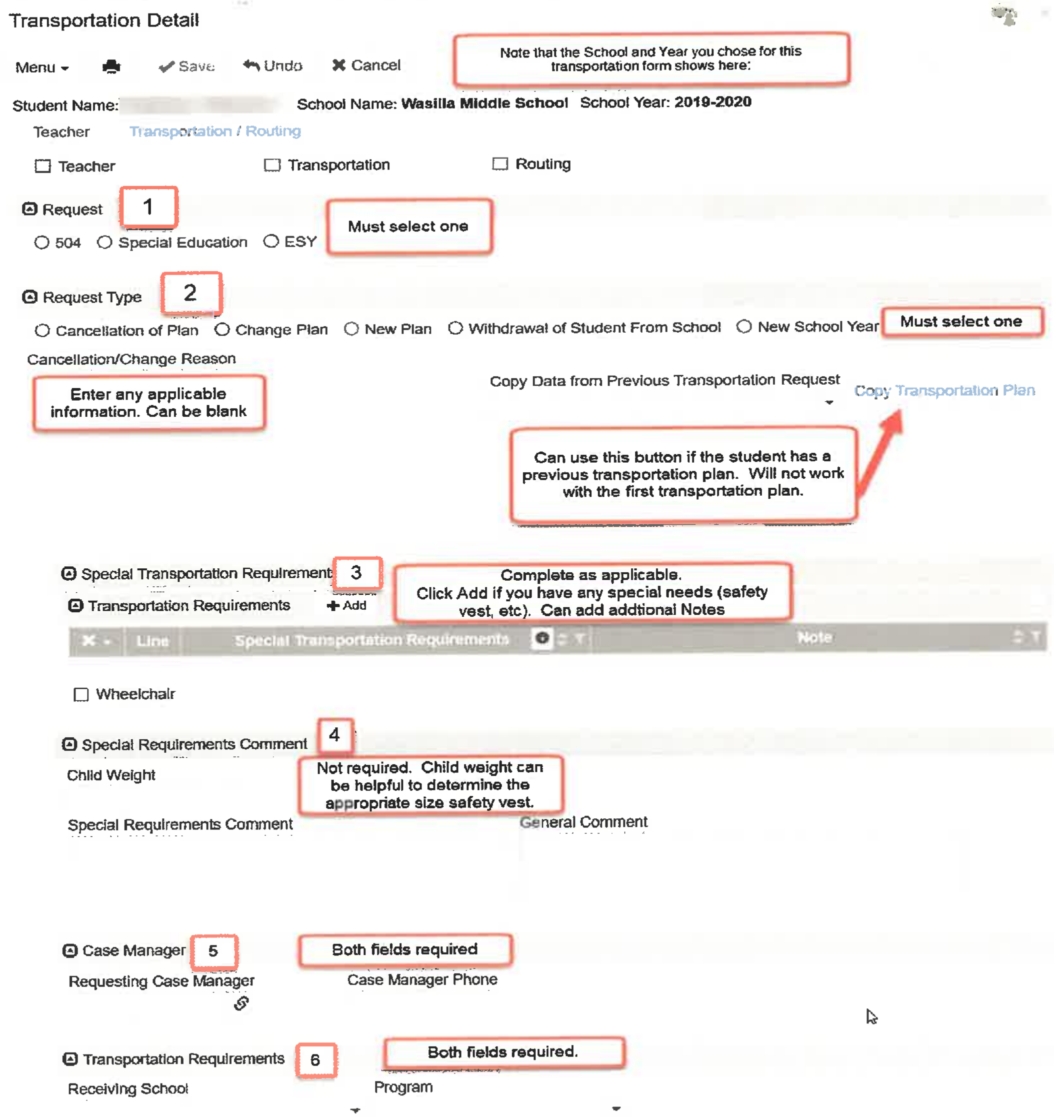
6. Select green arrow in the Show Details box, transportation form will open.



⊟ Open Transportation Requests ✚ Add

✖	Line	Open Date	Current Status	School	School Year	Show Details
	1	02/07/2020	Teacher	Wasilla Middle School	2019-2020	▶

7. Complete the form. All fields are required unless otherwise noted:



Transportation Detail

Menu ▾ 🖨 ✔ Save ↶ Undo ✖ Cancel

Note that the School and Year you chose for this transportation form shows here:

Student Name: [redacted] School Name: **Wasilla Middle School** School Year: **2019-2020**

Teacher Transportation / Routing

☐ Teacher ☐ Transportation ☐ Routing

⊟ Request 1

○ 504 ○ Special Education ○ ESY

Must select one

⊟ Request Type 2

○ Cancellation of Plan ○ Change Plan ○ New Plan ○ Withdrawal of Student From School ○ New School Year

Must select one

Cancellation/Change Reason

Enter any applicable information. Can be blank

Copy Data from Previous Transportation Request ▾ Copy Transportation Plan

Can use this button if the student has a previous transportation plan. Will not work with the first transportation plan.

⊟ Special Transportation Requirement 3

⊟ Transportation Requirements ✚ Add

Complete as applicable. Click Add if you have any special needs (safety vest, etc). Can add addtional Notes

✖	Line	Special Transportation Requirements	Note

☐ Wheelchair

⊟ Special Requirements Comment 4

Child Weight

Not required. Child weight can be helpful to determine the appropriate size safety vest.

Special Requirements Comment

General Comment

⊟ Case Manager 5

Both fields required

Requesting Case Manager

Case Manager Phone

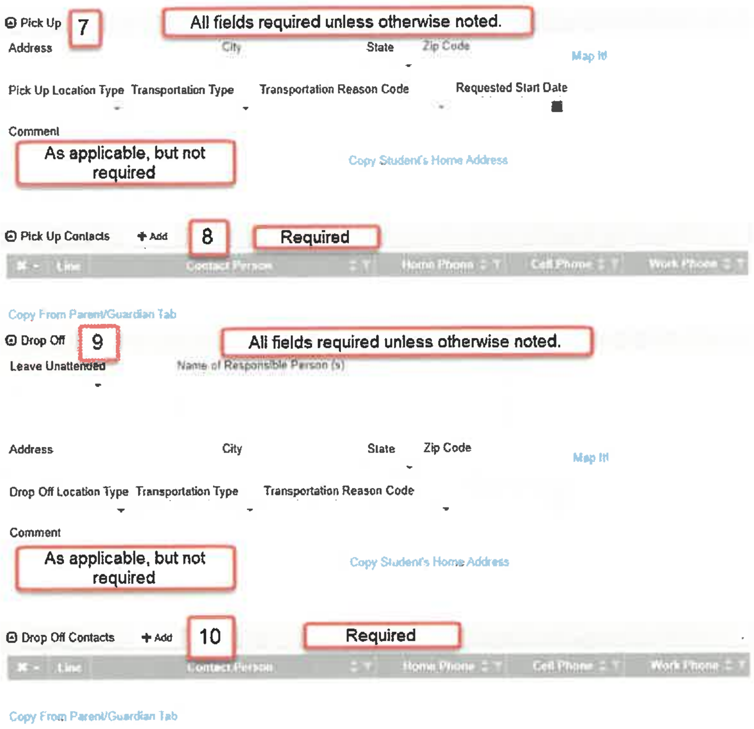
⊟ Transportation Requirements 6

Both fields required.

Receiving School ▾

Program ▾

7/20/21


Pick Up
7
Address
City
State
Zip Code
Map It!
Pick Up Location Type
Transportation Type
Transportation Reason Code
Requested Start Date
Comment
Copy Student's Home Address
Pick Up Contacts
Add
8
Line
Contact Person
Home Phone
Cell Phone
Work Phone
Copy From Parent/Guardian Tab
Drop Off
9
Leave Unattended
Name of Responsible Person (s)
Address
City
State
Zip Code
Map It!
Drop Off Location Type
Transportation Type
Transportation Reason Code
Comment
Copy Student's Home Address
Drop Off Contacts
Add
10
Line
Contact Person
Home Phone
Cell Phone
Work Phone
Copy From Parent/Guardian Tab

All fields required unless otherwise noted.

As applicable, but not required

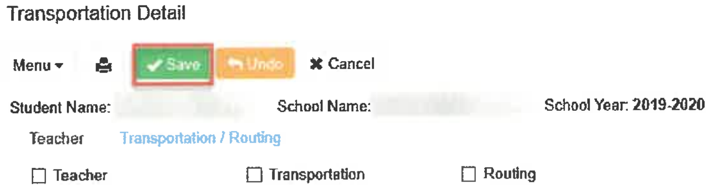
Required

All fields required unless otherwise noted.

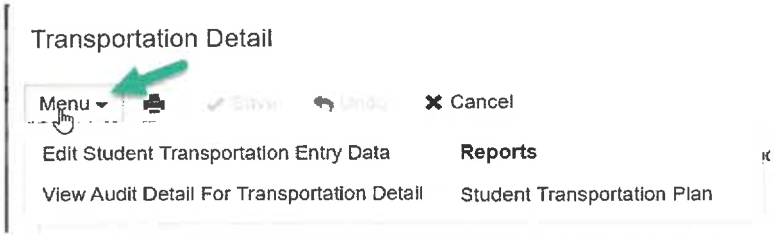
As applicable, but not required

Required

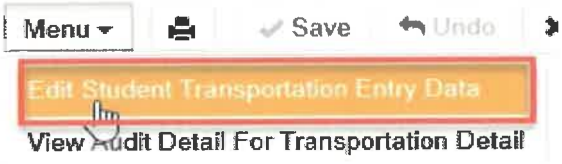
8. Once form is complete click save at the top of the form.


Transportation Detail
Menu
Save
Undo
Cancel
Student Name:
School Name:
School Year: 2019-2020
Teacher
Transportation / Routing
☐ Teacher
☐ Transportation
☐ Routing

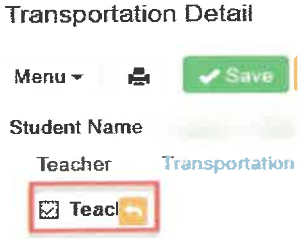
9. Hover cursor over Menu:


Transportation Detail
Menu
Save
Undo
Cancel
Edit Student Transportation Entry Data
View Audit Detail For Transportation Detail
Reports
Student Transportation Plan

10. Then click Edit Student Transportation Entry Data:


Menu
Save
Undo
Edit Student Transportation Entry Data
View Audit Detail For Transportation Detail

11. Click the Teacher box and Save. Form has now been sent to Transportation for routing:


Transportation Detail
Menu
Save
Student Name
Teacher
Transportation
☑ Teacl

7/20/21

Medicaid Consent

January 2021

When do I address Medicaid Consent?

- Transfer In Meeting
- At annual review if Medicaid Consent has not been obtained.
- When parent signs ***Initial*** Consent to Evaluate.

****** Parents sign Medicaid Consent even if they are not eligible. ******

Which students would we address Medicaid consent for?

- Any student with a related service.

Who is responsible for obtaining Medicaid consent signature?

- The case manager is responsible for obtaining Medicaid consent signature and completing the paperwork.
- There may be instances where another certified special ed staff member will obtain the signature, this is rare.

How do I complete Medicaid Parent Consent?

- Follow the steps in the 'How To' at the end of this document.

What do I do with the original signature?

- Your Record Specialist at your school will upload the original signed document into Historic Documents tab.
- Send the original to your Record Technician at SSS.

What if the parent gave consent via virtual platform or over the phone?

- Note in your meeting notes that the parent gave consent verbally via (Zoom, phone call, etc) and a form will be sent home for parent signature.
- Let the parent know that a consent will be sent home with the student or by mail for the parent signature. Parent should sign and return with student or in a postage paid envelope.

Does the parent sign a new consent at each annual review?

- No. Once we have consent to bill Medicaid, you do not need to gain a new consent.

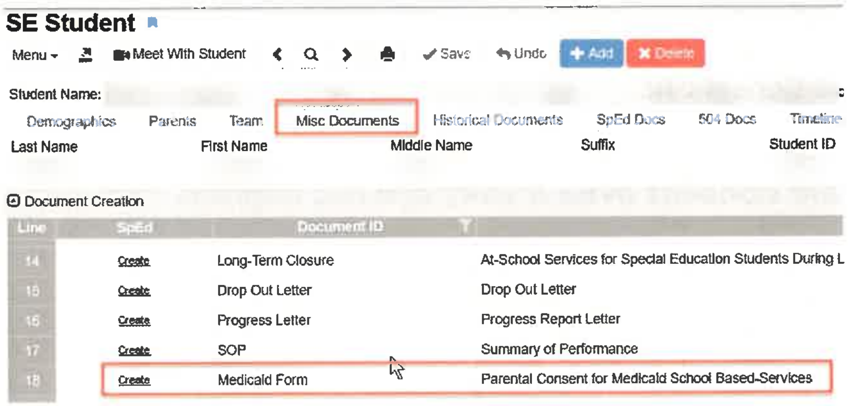
- If the student's Medicaid status changes, (for example: they have recently become eligible), a new consent should be obtained to reflect this status. If they are no longer eligible, this change does not need a newly signed consent.

What if the student exits and then returns to our school district?

- Follow the steps as if they are a new student to the district with a new Medicaid Consent.

How To Complete Medicaid Consent

Medicaid Consent is located: SE Student Screen>Misc Docs Tab>Medicaid Form

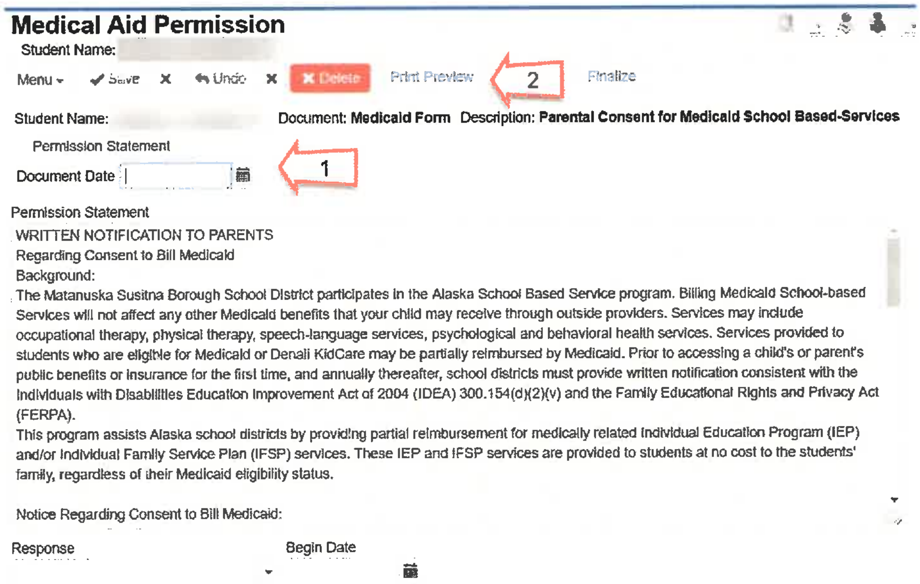

SE Student
Menu
Meet With Student
Save
Undo
Add
Delete
Demographics
Parents
Team
Misc Documents
Historical Documents
SpEd Docs
504 Docs
Timeline
Document Creation

Student Name: [redacted]

Last Name First Name Middle Name Suffix Student ID

Line	SpEd	Document ID	
14	Create	Long-Term Closure	At-School Services for Special Education Students During L
15	Create	Drop Out Letter	Drop Out Letter
16	Create	Progress Letter	Progress Report Letter
17	Create	SOP	Summary of Performance
18	Create	Medicaid Form	Parental Consent for Medicaid School Based-Services

Open document, enter Document Date to be date of meeting, and Print Preview the document.


Medical Aid Permission
Menu
Save
Undo
Delete
Print Preview
2
Finalize
Permission Statement
1

Student Name: [redacted]

Student Name: [redacted] Document: **Medicaid Form** Description: **Parental Consent for Medicaid School Based-Services**

Document Date

Permission Statement

WRITTEN NOTIFICATION TO PARENTS
Regarding Consent to Bill Medicaid
Background:

The Matanuska Susitna Borough School District participates in the Alaska School Based Service program. Billing Medicaid School-based Services will not affect any other Medicaid benefits that your child may receive through outside providers. Services may include occupational therapy, physical therapy, speech-language services, psychological and behavioral health services. Services provided to students who are eligible for Medicaid or Denali KidCare may be partially reimbursed by Medicaid. Prior to accessing a child's or parent's public benefits or insurance for the first time, and annually thereafter, school districts must provide written notification consistent with the Individuals with Disabilities Education Improvement Act of 2004 (IDEA) 300.154(d)(2)(v) and the Family Educational Rights and Privacy Act (FERPA).

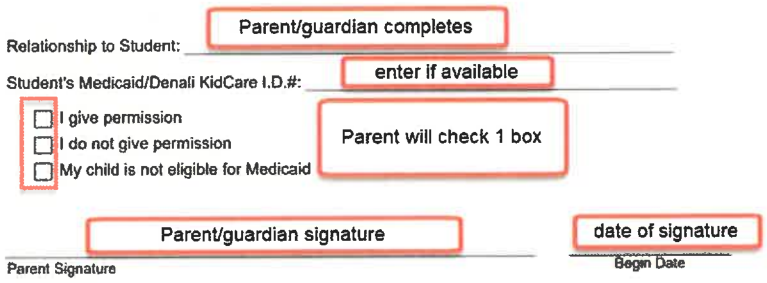
This program assists Alaska school districts by providing partial reimbursement for medically related Individual Education Program (IEP) and/or Individual Family Service Plan (IFSP) services. These IEP and IFSP services are provided to students at no cost to the students' family, regardless of their Medicaid eligibility status.

Notice Regarding Consent to Bill Medicaid:

Response Begin Date

You now have the document for parent to sign.

Parent will complete the following and check 1 box:


Parent/guardian completes
enter if available
Parent will check 1 box
Parent/guardian signature
date of signature

Relationship to Student: ______

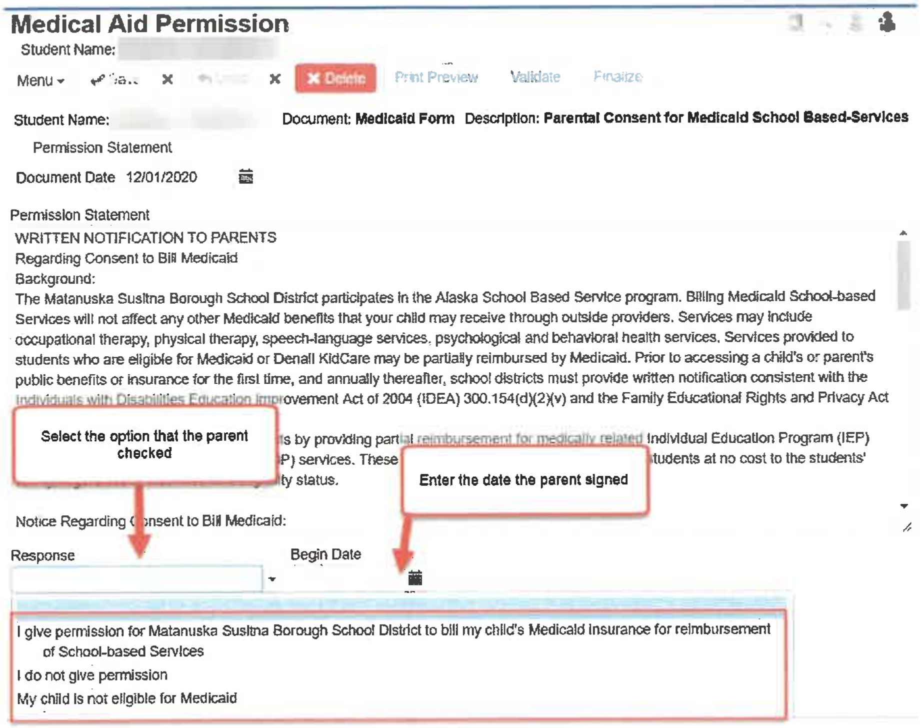
Student's Medicaid/Denali KidCare I.D.#: ______

☐ I give permission
☐ I do not give permission
☐ My child is not eligible for Medicaid

Parent Signature ______ Begin Date ______

Return to the Medicaid Form you opened and Print Previewed.

Enter the parent permission that they checked on their signed form, and the date that the parent signed, and Save.



Student Name: [redacted]

Student Name: [redacted] Document: **Medicaid Form** Description: **Parental Consent for Medicaid School Based-Services**

Permission Statement

Document Date 12/01/2020

Permission Statement

WRITTEN NOTIFICATION TO PARENTS

Regarding Consent to Bill Medicaid

Background:

The Matanuska Susitna Borough School District participates in the Alaska School Based Service program. Billing Medicaid School-based Services will not affect any other Medicaid benefits that your child may receive through outside providers. Services may include occupational therapy, physical therapy, speech-language services, psychological and behavioral health services. Services provided to students who are eligible for Medicaid or Denali KidCare may be partially reimbursed by Medicaid. Prior to accessing a child's or parent's public benefits or insurance for the first time, and annually thereafter, school districts must provide written notification consistent with the Individuals with Disabilities Education Improvement Act of 2004 (IDEA) 300.154(d)(2)(v) and the Family Educational Rights and Privacy Act

…ts by providing partial reimbursement for medically related Individual Education Program (IEP) …P) services. These … students at no cost to the students' …ty status.

Select the option that the parent checked

Enter the date the parent signed

Notice Regarding Consent to Bill Medicaid:

Response

Begin Date

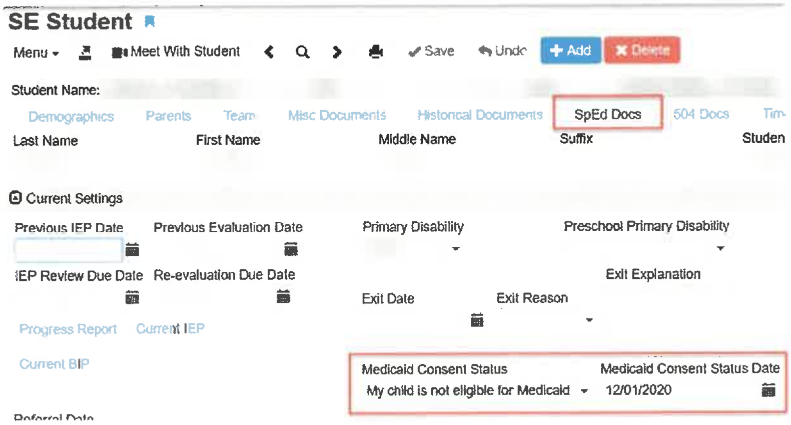
I give permission for Matanuska Susitna Borough School District to bill my child's Medicaid insurance for reimbursement of School-based Services

I do not give permission

My child is not eligible for Medicaid

Finalize this form.

The selection for permission and the date entered on this form will populate on the SE Student Screen>Sped Doc Tab>Medicaid fields.



Student Name: [redacted]

Last Name First Name Middle Name Suffix Studen

Current Settings

Previous IEP Date

Previous Evaluation Date

Primary Disability

Preschool Primary Disability

IEP Review Due Date

Re-evaluation Due Date

Exit Date

Exit Reason

Exit Explanation

Medicaid Consent Status: My child is not eligible for Medicaid

Medicaid Consent Status Date: 12/01/2020

Referral Date

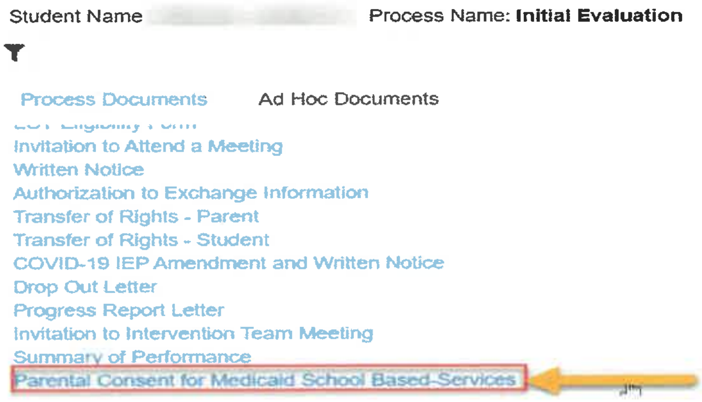
Record Specialist to upload original signature page to Historical Documents>Attached Documents Grid.

Original Signature sent to SSS Record Technician.

Medicaid Consent Form

- **Verbal consent** via Zoom/Skype/Phone **is not acceptable** for Medicaid. The form **must** be signed by the Parent/Guardian

Teams can find the form in the Ad Hoc Documents, accessible from their Portfolio list:

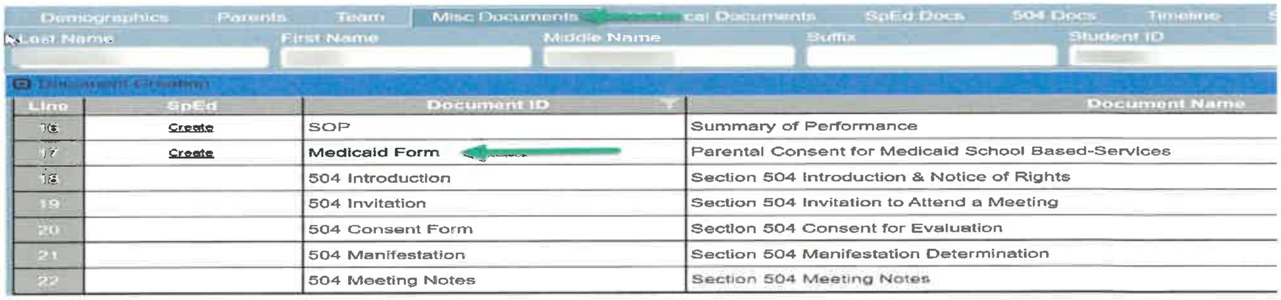


Student Name [redacted] Process Name: **Initial Evaluation**

Process Documents
Ad Hoc Documents

Invitation to Attend a Meeting
Written Notice
Authorization to Exchange Information
Transfer of Rights - Parent
Transfer of Rights - Student
COVID-19 IEP Amendment and Written Notice
Drop Out Letter
Progress Report Letter
Invitation to Intervention Team Meeting
Summary of Performance
Parental Consent for Medicaid School Based-Services

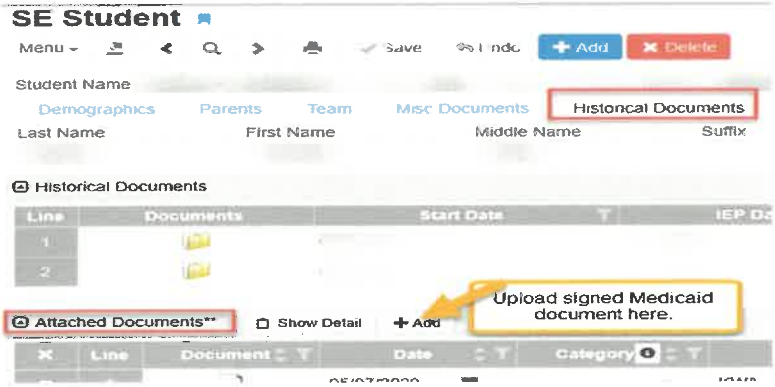
The form can also be found under the Misc Documents tab in the student's SE record:



Demographics
Parents
Team
Misc Documents
cal Documents
SpEd Docs
504 Docs
Timeline
Last Name
First Name
Middle Name
Suffix
Student ID
Document Creation

Line	SpEd	Document ID	Document Name
16	Create	SOP	Summary of Performance
17	Create	Medicaid Form	Parental Consent for Medicaid School Based-Services
18		504 Introduction	Section 504 Introduction & Notice of Rights
19		504 Invitation	Section 504 Invitation to Attend a Meeting
20		504 Consent Form	Section 504 Consent for Evaluation
21		504 Manifestation	Section 504 Manifestation Determination
22		504 Meeting Notes	Section 504 Meeting Notes

1. Case manager will enter the date on this form for any student that will be receiving a related service (for Speech, OT, PT, Counseling, or any other billable service); parent/guardian will provide a response (permission granted, denied, or not receiving Medicaid)
2. Information from the completed/signed form **is entered into the open form in Synergy**, and the form is Finalized
3. The original is uploaded under the Attached Documents in the Historical Documents tab, then sent to Student Support Services



SE Student
Menu
Save
Undo
Add
Delete
Demographics
Parents
Team
Misc Documents
Historical Documents
Last Name
First Name
Middle Name
Suffix
Historical Documents
Line
Documents
Start Date
IEP Da
1
2
Attached Documents**
Show Detail
Add
Line
Document
Date
Category

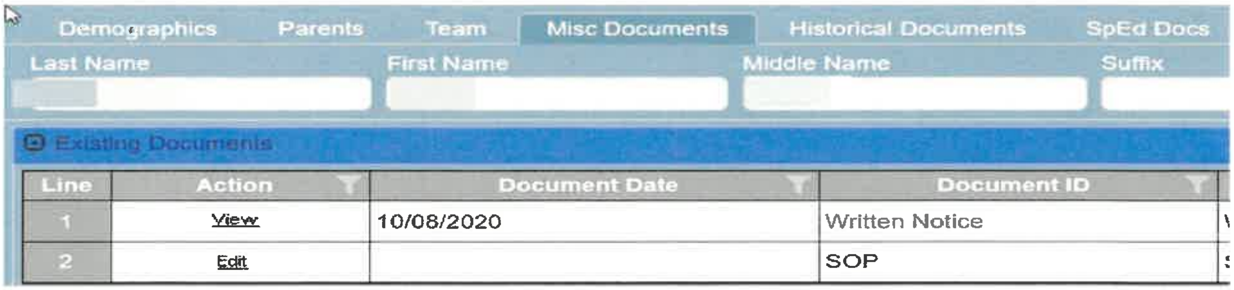
Student Name [redacted]

Upload signed Medicaid document here.

- Questions regarding Medicaid should be directed to the Student Support Medicaid Billing Technician

Summary of Performance (SOP) for Graduating Seniors

Case Managers can open the SOP document in the Misc Docs at any time and start working in the document:



Line	Action	Document Date	Document ID
1	View	10/08/2020	Written Notice
2	Edit		SOP

**The Validation that required the document be Finalized before a Process move has been removed.

*The date of the Summary of Performance does not have to match the Graduation date. It can be a prior date since the form is usually completed prior to the Seniors actual last day of school.

Once the SOP is finished, and all other documents in the current Process are finalized or deleted, the Process can be moved to Exit ***with the SOP still open/unfinalized in Misc Docs.***

In the **Exit** Process, Case Managers will:

- Finish and Finalize the SOP in the Misc Documents tab
- Complete the Exit Form and Written Notice in the Exit process in the Sped Docs tab
    - Exit and Written Notice date should match the date Registrars used as the Graduation date
- Finalize the Exit Form and Written Notice

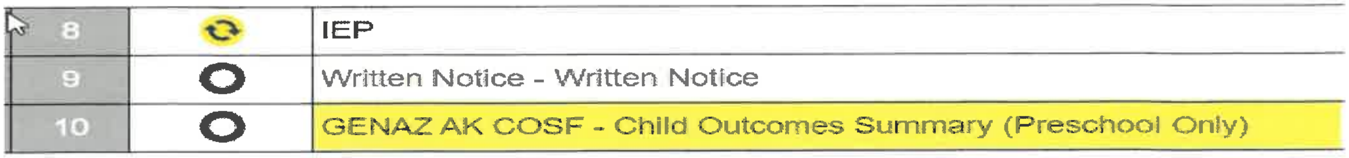
A copy of the ESER/IEP ***does not*** need to be uploaded to the SOP or attached to the Exit Process.

When Student Support processes the Exit from Synergy, the Finalized SOP will pull into the yellow Historic Exit folder, and live there with the Exit Form and Written Notice.

Once the Case Manager has completed the above, the Records Technician will Exit the Student from Synergy SE.

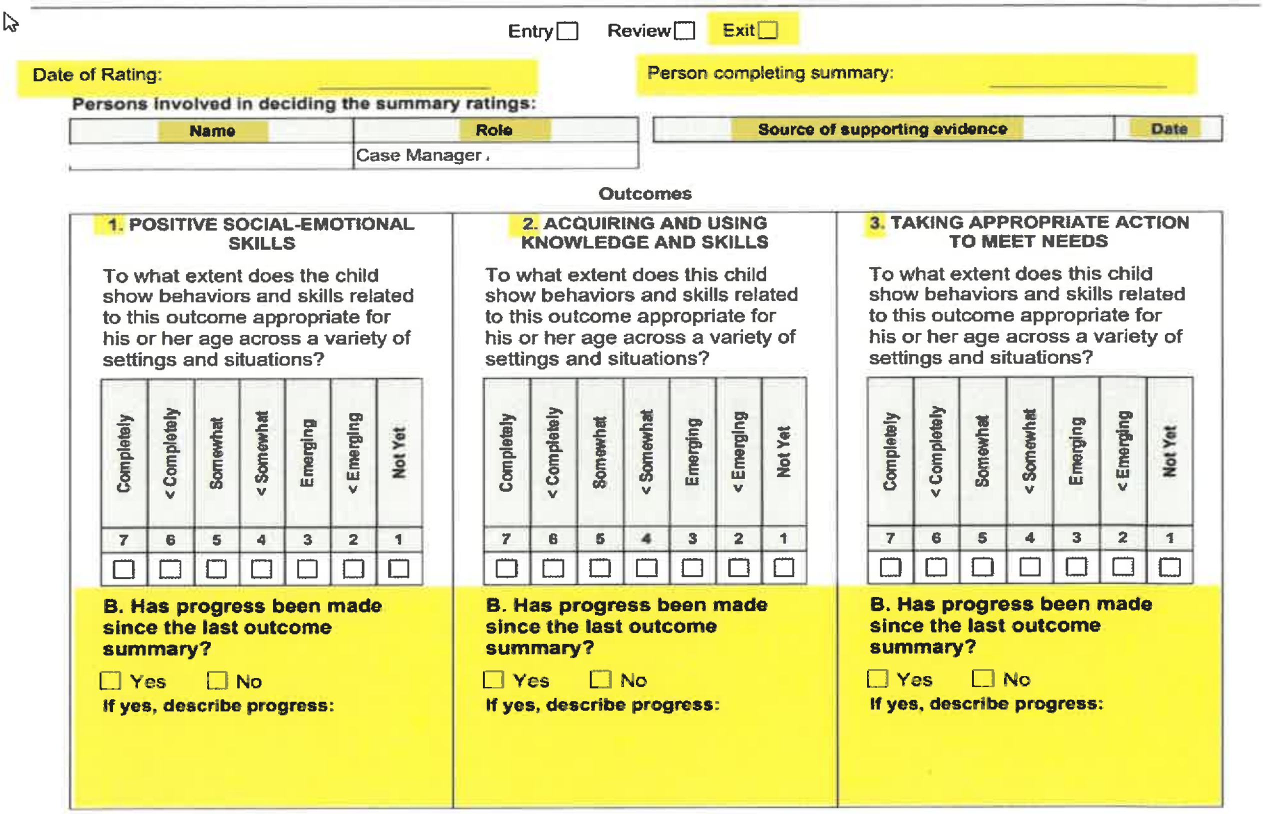
7/13/21

❖ Child Outcomes Summary Exit



8	↻	IEP
9	○	Written Notice - Written Notice
10	○	GENAZ AK COSF - Child Outcomes Summary (Preschool Only)

1. When a **Preschool student** is turning 5 and will be moving on to Kindergarten the following school year, a Child Outcomes Summary Exit must be completed by the Case Manager in the Spring along with the Kindergarten Transition



Entry☐ Review☐ Exit☐

Date of Rating: ______

Person completing summary: ______

Persons involved in deciding the summary ratings:

Name	Role
	Case Manager

Source of supporting evidence	Date

Outcomes

1. POSITIVE SOCIAL-EMOTIONAL SKILLS

To what extent does the child show behaviors and skills related to this outcome appropriate for his or her age across a variety of settings and situations?

Completely	< Completely	Somewhat	< Somewhat	Emerging	< Emerging	Not Yet
7	6	5	4	3	2	1
☐	☐	☐	☐	☐	☐	☐

B. Has progress been made since the last outcome summary?

☐ Yes ☐ No

If yes, describe progress:

2. ACQUIRING AND USING KNOWLEDGE AND SKILLS

To what extent does this child show behaviors and skills related to this outcome appropriate for his or her age across a variety of settings and situations?

Completely	< Completely	Somewhat	< Somewhat	Emerging	< Emerging	Not Yet
7	6	5	4	3	2	1
☐	☐	☐	☐	☐	☐	☐

B. Has progress been made since the last outcome summary?

☐ Yes ☐ No

If yes, describe progress:

3. TAKING APPROPRIATE ACTION TO MEET NEEDS

To what extent does this child show behaviors and skills related to this outcome appropriate for his or her age across a variety of settings and situations?

Completely	< Completely	Somewhat	< Somewhat	Emerging	< Emerging	Not Yet
7	6	5	4	3	2	1
☐	☐	☐	☐	☐	☐	☐

B. Has progress been made since the last outcome summary?

☐ Yes ☐ No

If yes, describe progress:

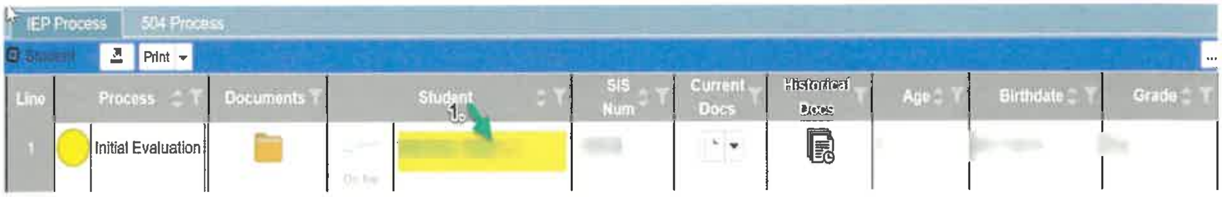
1. Exit box must be checked at the top
2. Date of Rating and Person completing the Summary is entered
3. Persons involved in deciding ratings should be identified
4. Source of supporting evidence is referenced (i.e. IEP documents, Goal progress, current evaluation results, etc)
5. Each area requires an entry rating of 1-7
6. Areas below the ratings are completed, describing any progress made by the Student from Entry to Exit
7. Document is Finalized when completed

❖ If a Preschool student qualified, but does not attend fully or at all, and comes back to MSBSD as a new Kindergarten student, the Kindergarten teacher would complete the COS Exit.

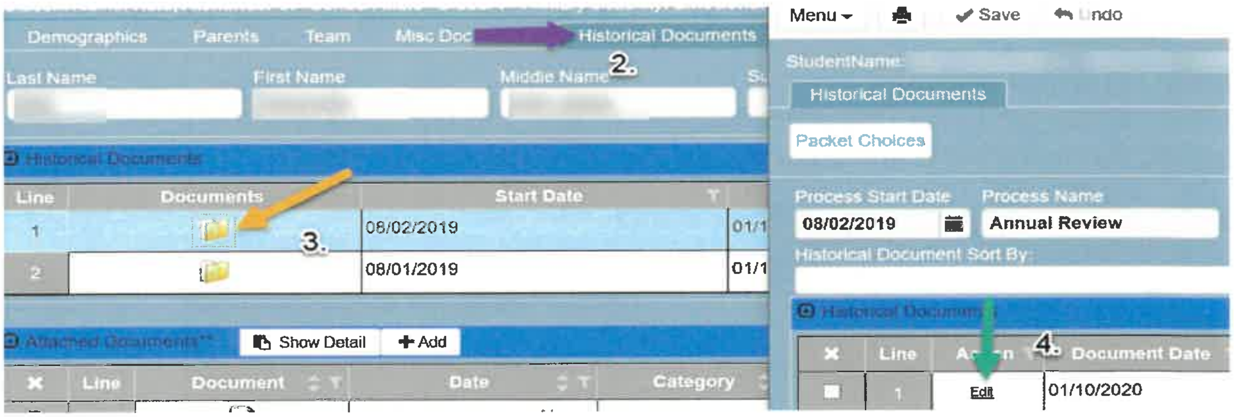
Accessing Unlocked Documents for Editing/Corrections:

When starting from the Portfolio view:

1. Go to the Students full SE Record by clicking the student name (blue hyperlink):


IEP Process
504 Process
Student
Print
Line
Process
Documents
Student
1.
SIS Num
Current Docs
Historical Docs
Age
Birthdate
Grade
1
Initial Evaluation

2. Click on the Historical Docs tab
3. Open the yellow folder on Line 1 (or whichever Line the documents are in)
4. Any reopened documents will say Edit to the left. Click Edit to open:


Demographics
Parents
Team
Misc Doc
Historical Documents
2.
Last Name
First Name
Middle Name
Historical Documents
Line
Documents
Start Date
3.
Attached Documents
Show Detail
Add
Line
Document
Date
Category
Menu
Save
Undo
StudentName:
Historical Documents
Packet Choices
Process Start Date
Process Name
Historical Document Sort By:
Historical Documents
4.
Line
Action
Document Date

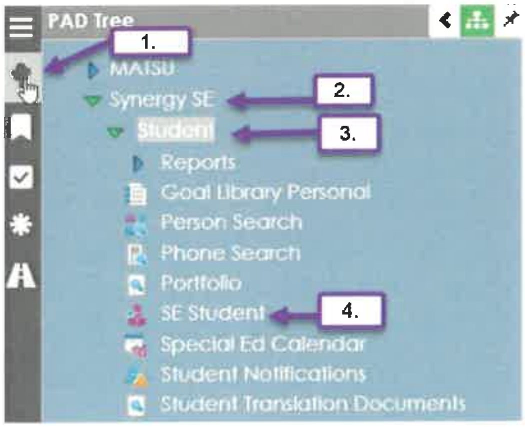
Line	Documents	Start Date
1		08/02/2019
2		08/01/2019

Process Start Date: 08/02/2019
Process Name: Annual Review

Line	Action	Document Date
1	Edit	01/10/2020

To go directly to the SE Student screen:

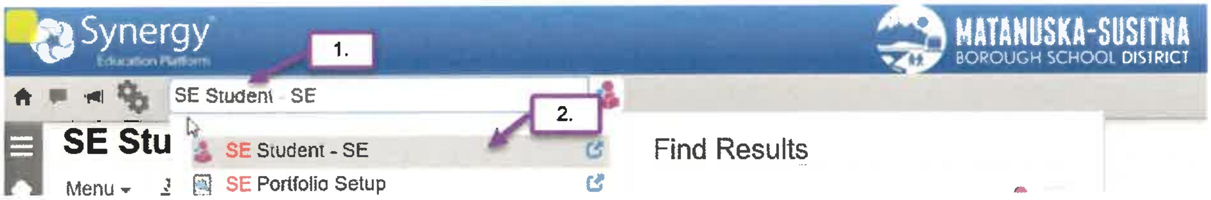
1. Go to the PAD Tree on the left side of the Synergy screen
2. Choose Synergy SE
3. Choose Student
4. Choose SE Student


PAD Tree
1.
MAISU
Synergy SE
2.
Student
3.
Reports
Goal Library Personal
Person Search
Phone Search
Portfolio
SE Student
4.
Special Ed Calendar
Student Notifications
Student Translation Documents

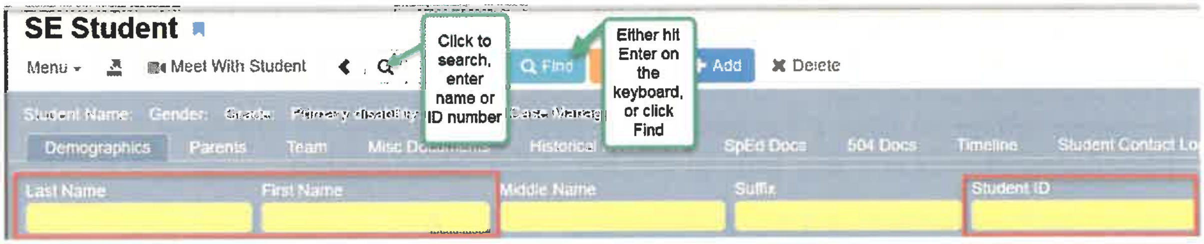
6/29/21

Or:

1. At the top of the Synergy screen type SE Student into the Quick Launch box
2. Click on SE Student when it appears in the screen list options


Synergy
Education Platform
MATANUSKA-SUSITNA
BOROUGH SCHOOL DISTRICT
1.
2.
SE Stu
Menu
SE Student - SE
SE Portfolio Setup
Find Results

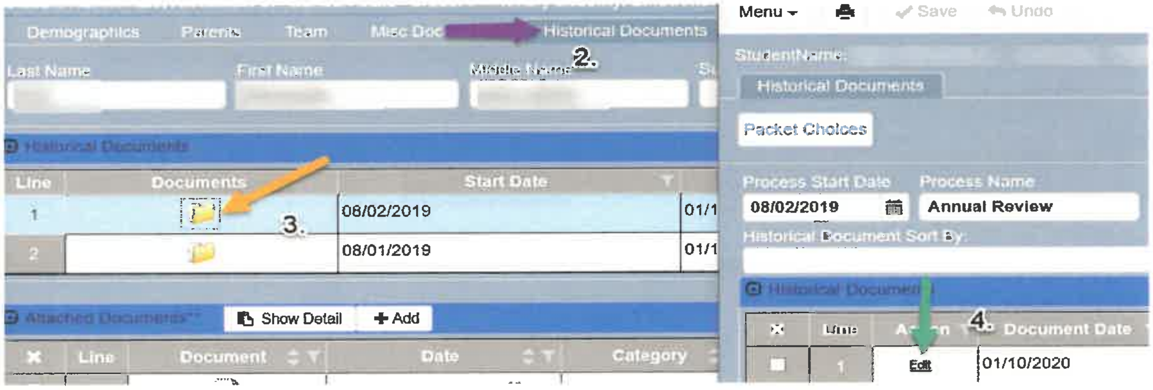
SE Student - SE


SE Student
Menu
Meet With Student
Find
Add
Delete
Student Name:
Gender:
Grade:
Primary disability
Case Manager
Demographics
Parents
Team
Misc Documents
Historical
SpEd Docs
504 Docs
Timeline
Student Contact Lo
Last Name
First Name
Middle Name
Suffix
Student ID

Click to search, enter name or ID number

Either hit Enter on the keyboard, or click Find

Click on the Historical Docs tab
3. Open the yellow folder on Line 1 (or whichever Line the documents are in)
4. Any reopened documents will say Edit to the left. Click Edit to open:


Demographics
Parents
Team
Misc Doc
Historical Documents
2.
Last Name
First Name
Middle Name
Historical Documents
Line
Documents
Start Date
3.
Attached Documents
Show Detail
Add
Line
Document
Date
Category
Menu
Save
Undo
StudentName:
Historical Documents
Packet Choices
Process Start Date
Process Name
Historical Document Sort By:
Historical Document
Line
Action
4.
Document Date
Edit

Line	Documents	Start Date
1		08/02/2019
2		08/01/2019

Process Start Date: 08/02/2019
Process Name: Annual Review

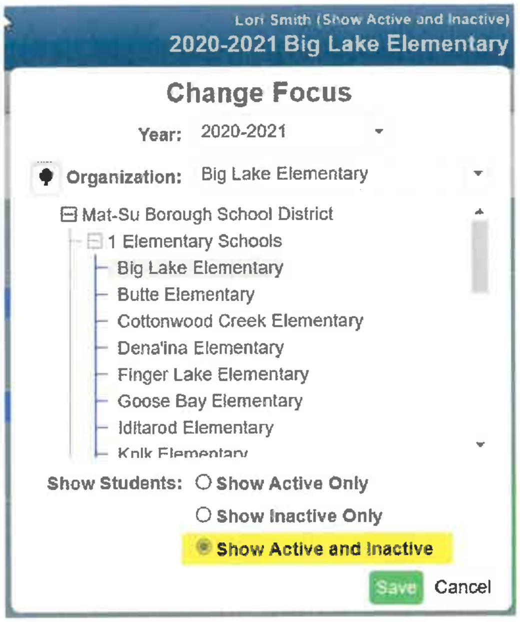
Line	Action	Document Date
1	Edit	01/10/2020

6/29/21

RUNNING CASELOADS AND PORTFOLIO LISTS

1. Caseload/Case Carrier Reports:

Focus to current school year and the desired school, choose Show Active and Inactive, click Save:



Lori Smith (Show Active and Inactive)
2020-2021 Big Lake Elementary

Change Focus

Year: 2020-2021

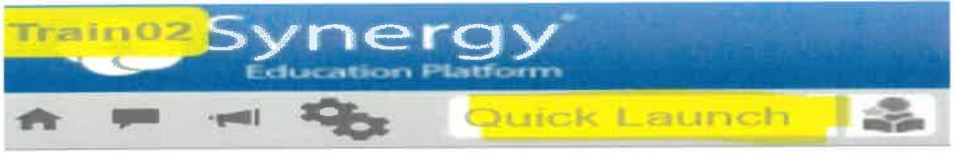
Organization: Big Lake Elementary

⊟ Mat-Su Borough School District
  ⊟ 1 Elementary Schools
    Big Lake Elementary
    Butte Elementary
    Cottonwood Creek Elementary
    Dena'ina Elementary
    Finger Lake Elementary
    Goose Bay Elementary
    Iditarod Elementary
    Knik Elementary

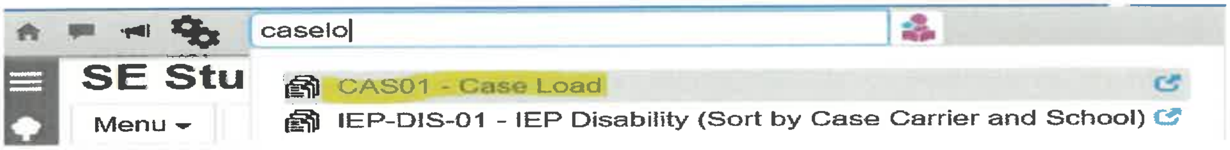
Show Students: ○ Show Active Only
○ Show Inactive Only
● Show Active and Inactive

Save
Cancel

Go to the Quick Launch box at the top of the Synergy screen, begin to type Caseload into the Quick Launch, and click CAS01-Case Load:



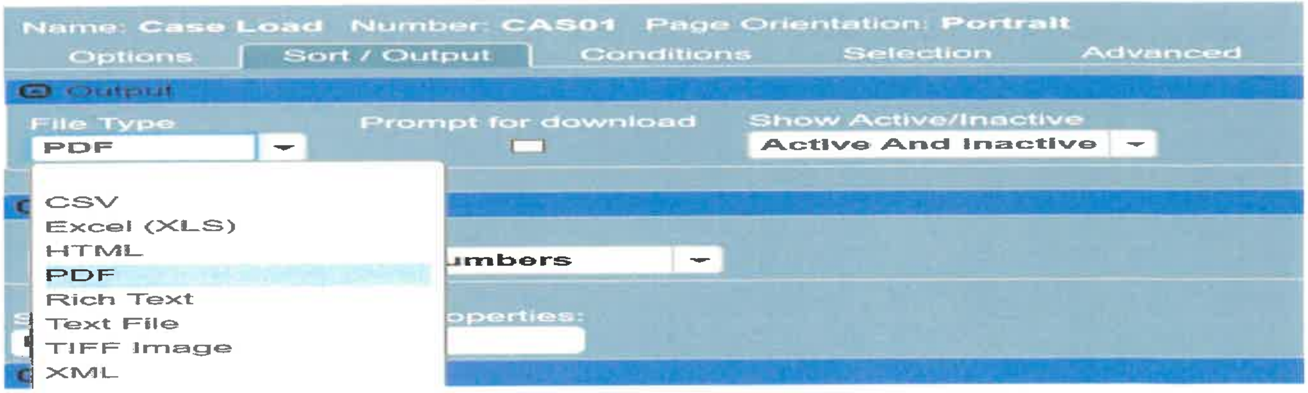
Train02
Synergy
Education Platform
Quick Launch



caselo

SE Stu
Menu
CAS01 - Case Load
IEP-DIS-01 - IEP Disability (Sort by Case Carrier and School)

If a format other than PDF is required, choose the Sort/Output tab and choose from the File Type Dropdown:



Name: Case Load Number: CAS01 Page Orientation: Portrait

Options
Sort / Output
Conditions
Selection
Advanced
Output

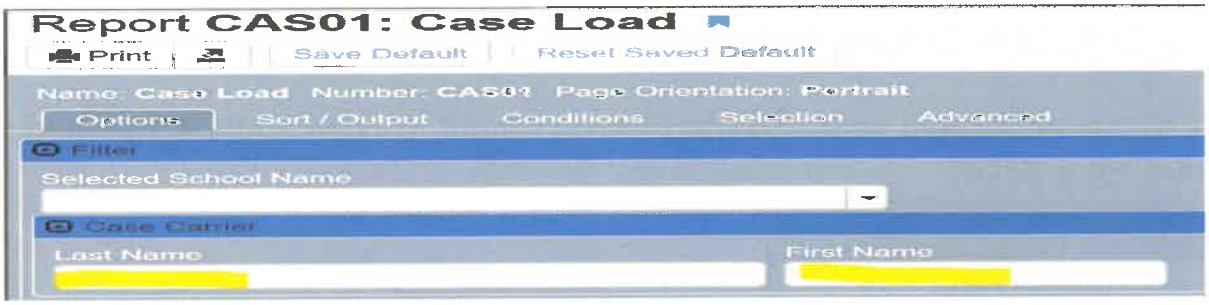
File Type: PDF

Prompt for download: ☐

Show Active/Inactive: Active And Inactive

CSV
Excel (XLS)
HTML
PDF
Rich Text
Text File
TIFF Image
XML
umbers
operties:

Go to the Options tab, enter the Last and First name of the Case Manager, and choose Print:


Print
Save Default
Reset Saved Default
Options
Sort / Output
Conditions
Selection
Advanced
Filter
Case Carrier

Report CAS01: Case Load

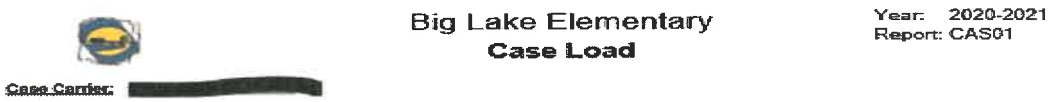
Name: Case Load Number: CAS01 Page Orientation: Portrait

Selected School Name

Last Name

First Name

Caseload list of assigned students for that Case Manager will generate:



Big Lake Elementary

Case Load

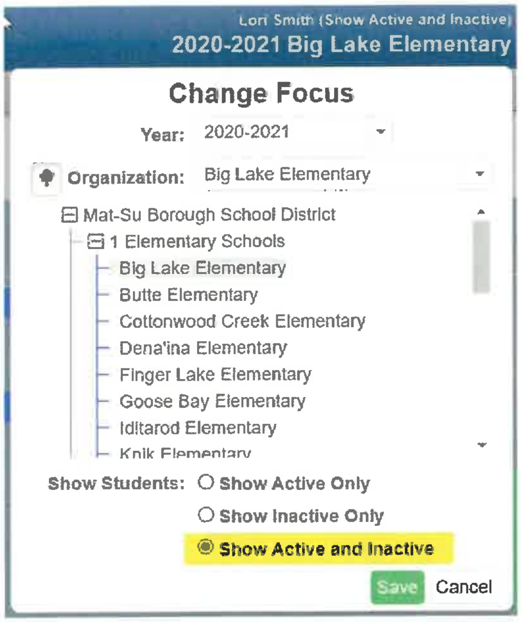
Year: 2020-2021
Report: CAS01

Case Carrier: [redacted]

- **If a student's name is in parenthesis, it indicates the student is not enrolled.** Follow up with Case Manager or Registrar so enrollment can be corrected, or student can be Exited from Synergy SE.

2. Portfolio List:

Focus to current school year and the desired school, choose Show Active and Inactive, click Save:


Lori Smith (Show Active and Inactive)
2020-2021 Big Lake Elementary

Change Focus

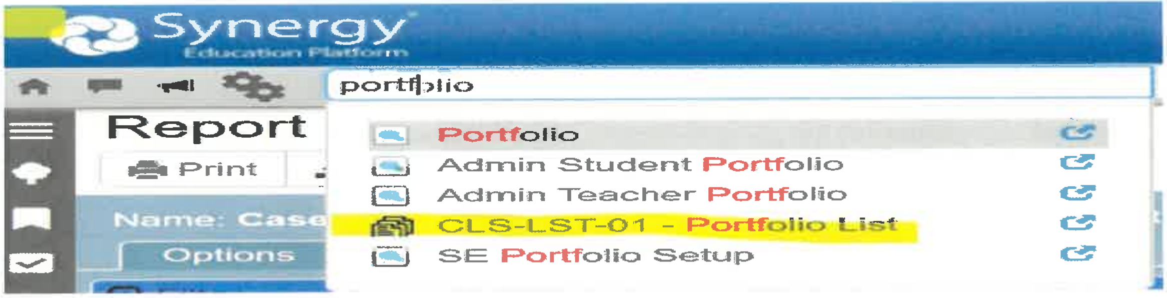
Year: 2020-2021

Organization: Big Lake Elementary

- Mat-Su Borough School District
  - 1 Elementary Schools
    - Big Lake Elementary
    - Butte Elementary
    - Cottonwood Creek Elementary
    - Dena'ina Elementary
    - Finger Lake Elementary
    - Goose Bay Elementary
    - Iditarod Elementary
    - Knik Elementary

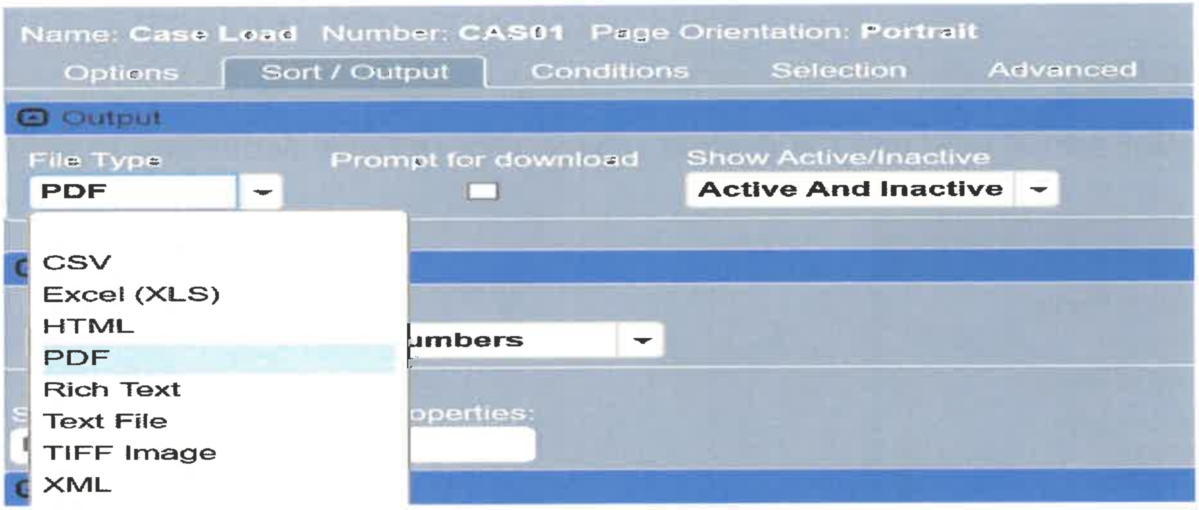
Show Students:
○ Show Active Only
○ Show Inactive Only
● Show Active and Inactive

Go to the Quick Launch box at the top of the Synergy screen, begin to type Portfolio into the Quick Launch, and click CLS-LST-01-Portfolio List:


portfolio

- Portfolio
- Admin Student Portfolio
- Admin Teacher Portfolio
- CLS-LST-01 - Portfolio List
- SE Portfolio Setup

If a format other than PDF is required, choose the Sort/Output tab and choose from the File Type Dropdown:


Options
Sort / Output
Conditions
Selection
Advanced
Output
CSV
Excel (XLS)
HTML
PDF
Rich Text
Text File
TIFF Image
XML
umbers
operties:

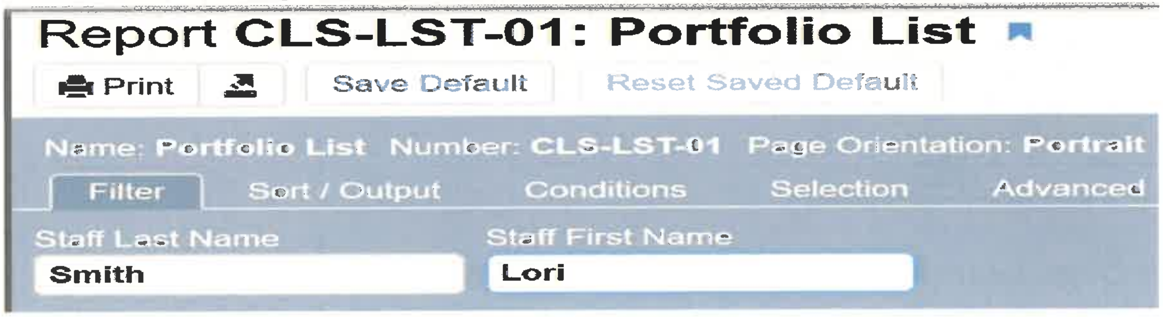
Name: **Case Load** Number: **CAS01** Page Orientation: **Portrait**

File Type: **PDF**

Prompt for download ☐

Show Active/Inactive: **Active And Inactive**

Enter Case Manager Last and First name and choose Print:

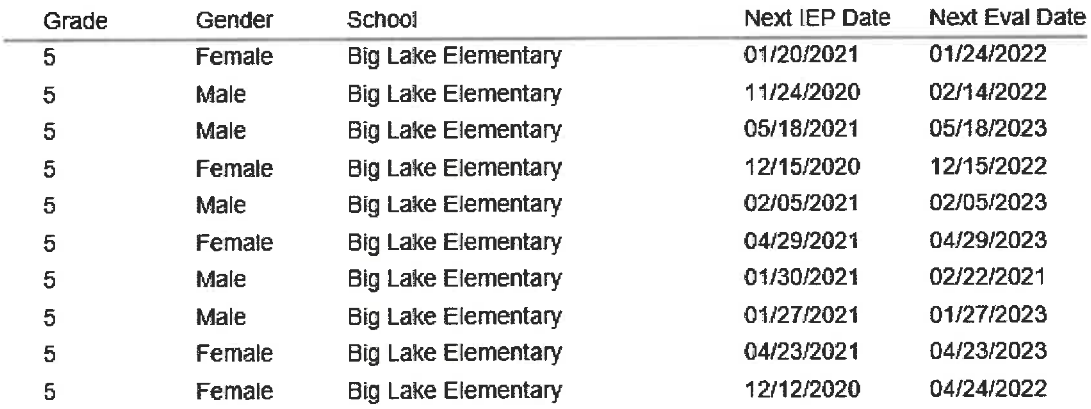

Report CLS-LST-01: Portfolio List
Print
Save Default
Reset Saved Default
Filter
Sort / Output
Conditions
Selection
Advanced

Name: **Portfolio List** Number: **CLS-LST-01** Page Orientation: **Portrait**

Staff Last Name: **Smith**

Staff First Name: **Lori**

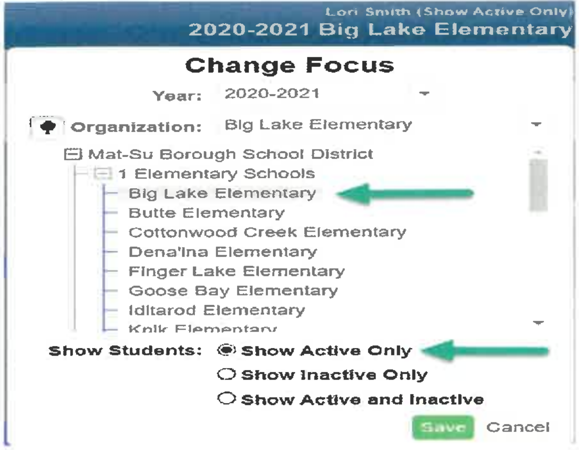
Report will generate for that Case Manager listing students, and information including Next IEP and Eval Dates:



Grade	Gender	School	Next IEP Date	Next Eval Date
5	Female	Big Lake Elementary	01/20/2021	01/24/2022
5	Male	Big Lake Elementary	11/24/2020	02/14/2022
5	Male	Big Lake Elementary	05/18/2021	05/18/2023
5	Female	Big Lake Elementary	12/15/2020	12/15/2022
5	Male	Big Lake Elementary	02/05/2021	02/05/2023
5	Female	Big Lake Elementary	04/29/2021	04/29/2023
5	Male	Big Lake Elementary	01/30/2021	02/22/2021
5	Male	Big Lake Elementary	01/27/2021	01/27/2023
5	Female	Big Lake Elementary	04/23/2021	04/23/2023
5	Female	Big Lake Elementary	12/12/2020	04/24/2022

Admin Progress Report for Checking Progress Notes

1. Focus to a specific school site by using either the expandable Focus list or the dropdown menu, then under Show Students choose Show Active Only, and click Save:



Lori Smith (Show Active Only)
2020-2021 Big Lake Elementary

Change Focus

Year: 2020-2021

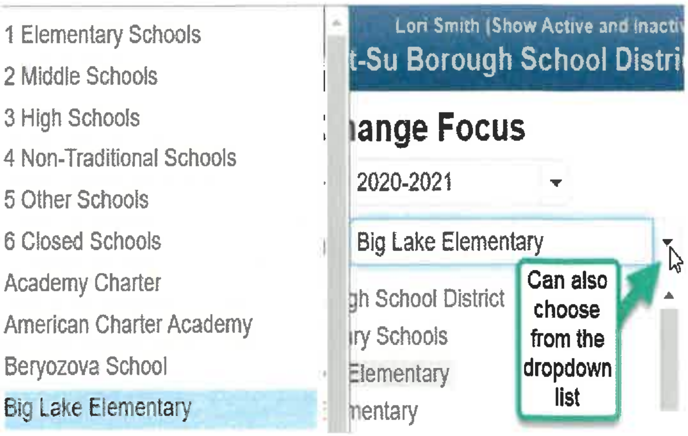
Organization: Big Lake Elementary

- Mat-Su Borough School District
  - 1 Elementary Schools
    - Big Lake Elementary
    - Butte Elementary
    - Cottonwood Creek Elementary
    - Dena'ina Elementary
    - Finger Lake Elementary
    - Goose Bay Elementary
    - Iditarod Elementary
    - Knik Elementary

Show Students: ● Show Active Only
○ Show Inactive Only
○ Show Active and Inactive

Save
Cancel

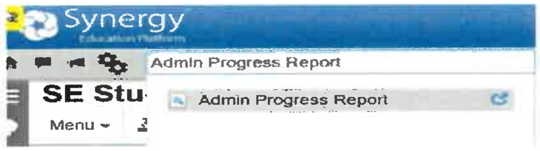
or



1 Elementary Schools
2 Middle Schools
3 High Schools
4 Non-Traditional Schools
5 Other Schools
6 Closed Schools
Academy Charter
American Charter Academy
Beryozova School
Big Lake Elementary
Lori Smith (Show Active and Inacti
t-Su Borough School Distri
hange Focus
2020-2021
Big Lake Elementary
gh School District
ry Schools
Elementary
mentary

Can also choose from the dropdown list

2. Go to the Quick Launch type in Admin Progress Report, and choose the report name in the dropdown:

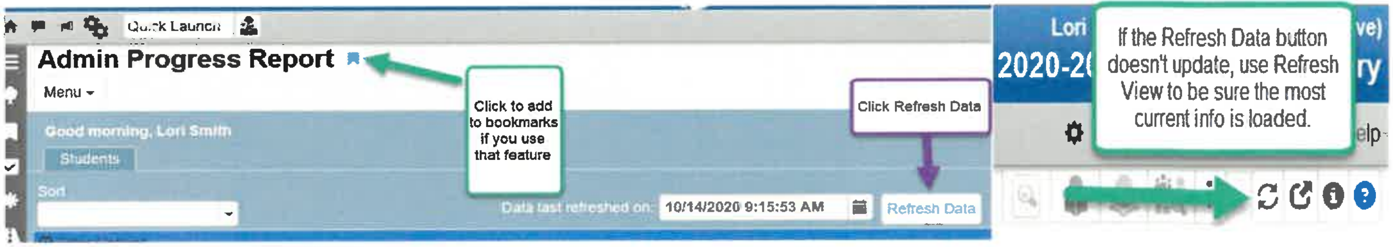


Synergy
SE Stu
Menu

Admin Progress Report

Admin Progress Report

3. Bookmark for future access, and refresh the data:



Quick Launch
Admin Progress Report
Menu
Good morning, Lori Smith
Students
Sort
Refresh Data
Lori
2020-2
ve)
ry
elp

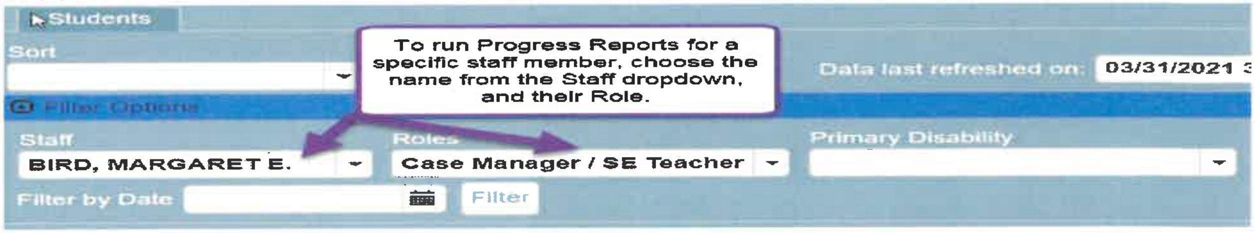
Click to add to bookmarks if you use that feature

Click Refresh Data

Data last refreshed on: 10/14/2020 9:15:53 AM

If the Refresh Data button doesn't update, use Refresh View to be sure the most current info is loaded.

4. Choose viewing options; Progress Reports for a specific Staff person, or for every student in the School:



Students
Sort
Filter Options
Filter by Date
Filter

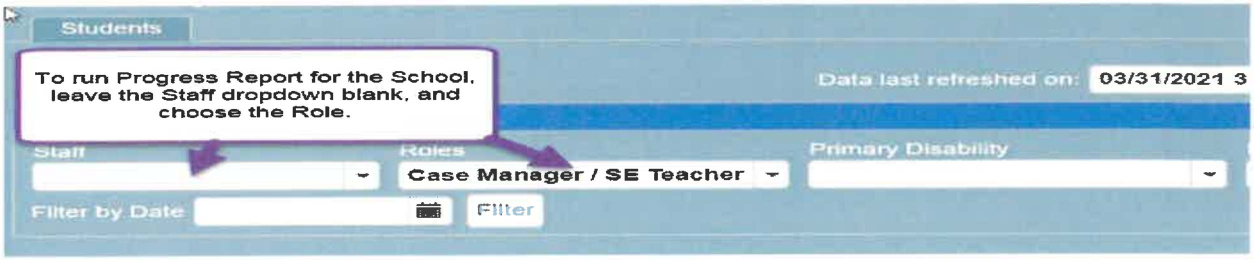
To run Progress Reports for a specific staff member, choose the name from the Staff dropdown, and their Role.

Data last refreshed on: 03/31/2021 3

Staff: BIRD, MARGARET E.

Roles: Case Manager / SE Teacher

Primary Disability:



Students
Filter by Date
Filter

To run Progress Report for the School, leave the Staff dropdown blank, and choose the Role.

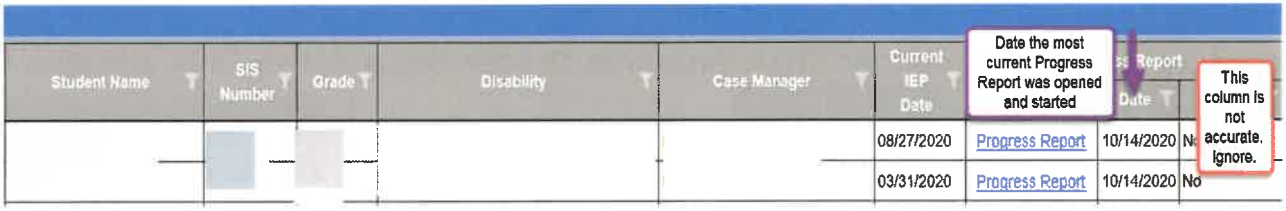
Data last refreshed on: 03/31/2021 3

Staff:

Roles: Case Manager / SE Teacher

Primary Disability:

5. In the grid will be information on the status of Progress Reports for each Student:

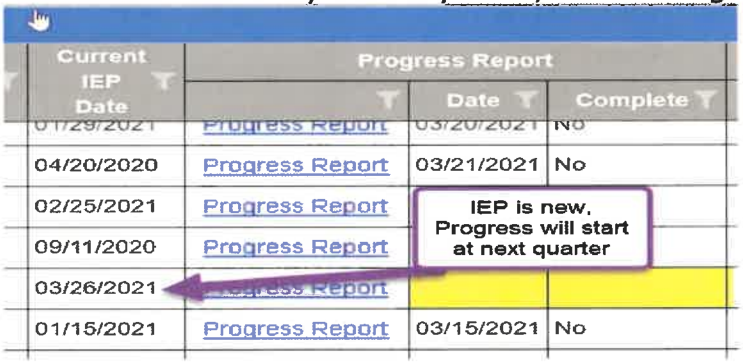


Student Name	SIS Number	Grade	Disability	Case Manager	Current IEP Date		Progress Report Date	
	[redacted]	[redacted]			08/27/2020	Progress Report	10/14/2020	No
					03/31/2020	Progress Report	10/14/2020	No

Date the most current Progress Report was opened and started

This column is not accurate. Ignore.

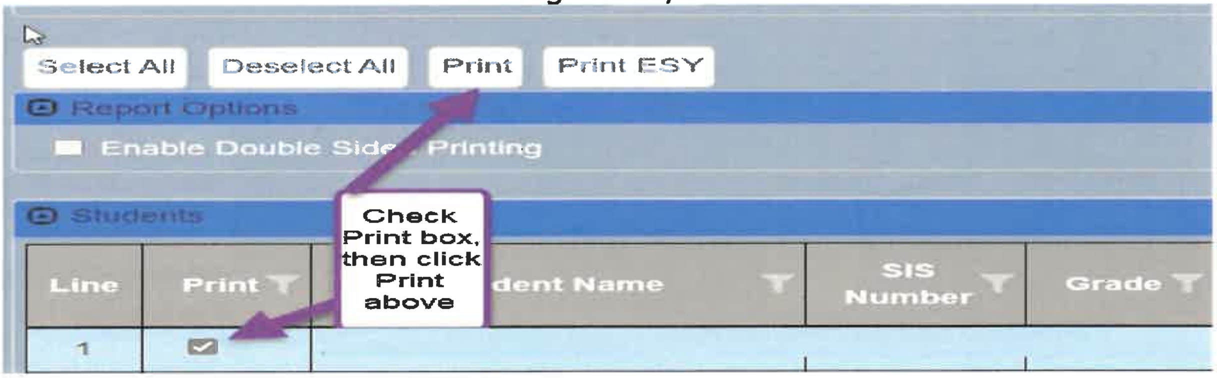
You may see blanks in the Progress Report Date column. If so, check the Current IEP Date. IEP may be very new, so no Progress has been reported yet:



Current IEP Date	Progress Report	Date	Complete
01/29/2021	Progress Report	03/20/2021	No
04/20/2020	Progress Report	03/21/2021	No
02/25/2021	Progress Report		
09/11/2020	Progress Report		
03/26/2021	Progress Report		
01/15/2021	Progress Report	03/15/2021	No

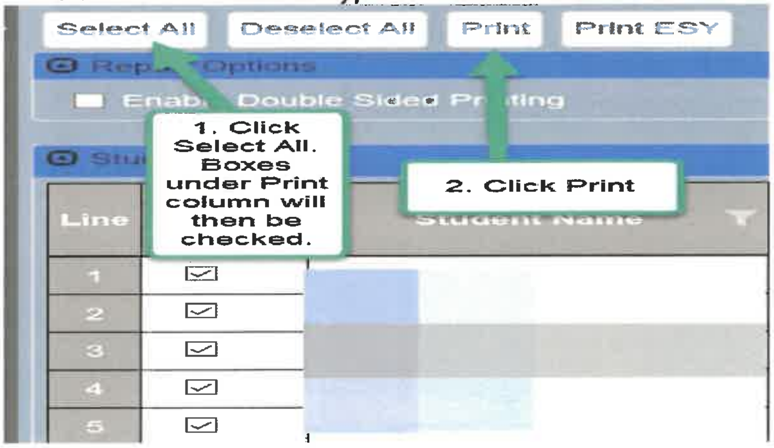
IEP is new, Progress will start at next quarter

6. To preview or print a Progress Report for an individual student, click the box under the Print column in that student's gridline, then choose Print:


Select All
Deselect All
Print
Print ESY
Report Options
Enable Double Sided Printing
Students
Line
Print
Student Name
SIS Number
Grade
1
☑

Check Print box, then click Print above

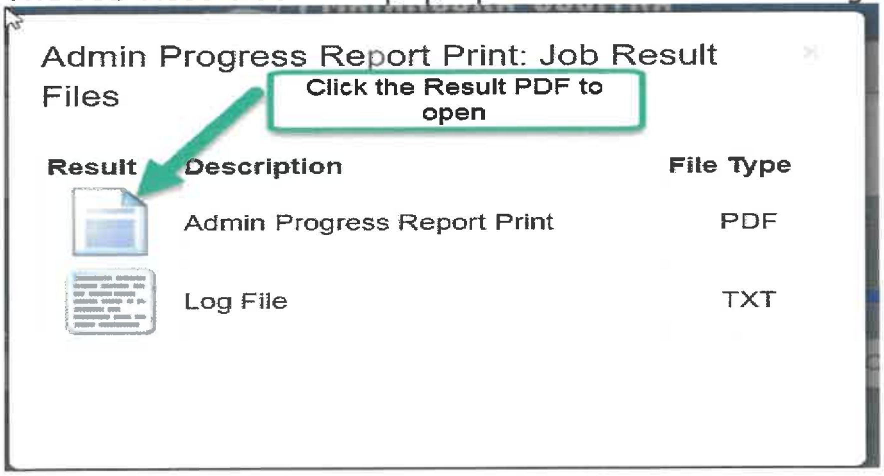
7. For an entire caseload or school, (dependent on the viewing filter options you choose in Number 4), use Select All to check Print for all gridlines:


Select All
Deselect All
Print
Print ESY
Report Options
Enable Double Sided Printing
Students
Line
Student Name
1 ☑
2 ☑
3 ☑
4 ☑
5 ☑

1. Click Select All. Boxes under Print column will then be checked.

2. Click Print

The Job Result box will pop up. Click the Admin Progress Report PDF to open:



Admin Progress Report Print: Job Result Files

Click the Result PDF to open

Result	Description	File Type
	Admin Progress Report Print	PDF
	Log File	TXT

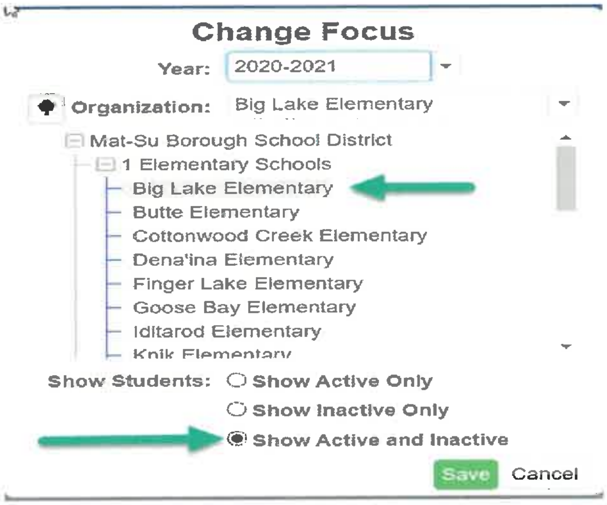
A copy of the most current Progress Report version will be generated for each student or all students, based on your Filter Option choices. The Report(s) can be printed if needed (there is the option to choose Double Sided under the Select All button).

For a random check for current Progress Report entries, scroll through the report and look for dates associated with the current quarter.

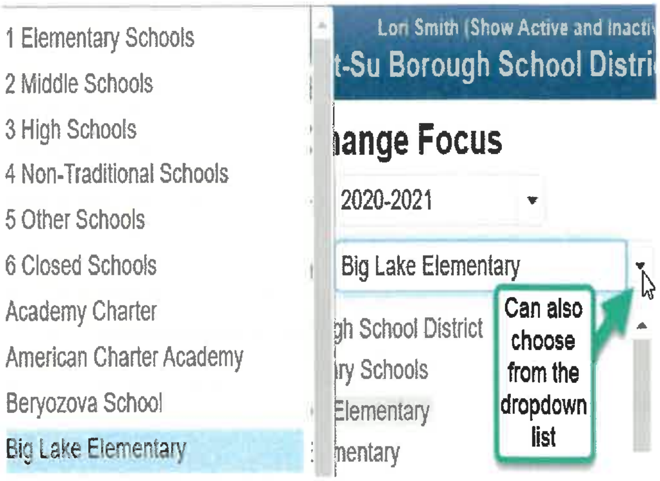
Pulling Data From the Portfolio

(Will include withdrawn students and Compliance Dates)

1. Focus to a specific school site by using either the expandable Focus list or the dropdown menu, then under Show Students choose Active and Inactive:

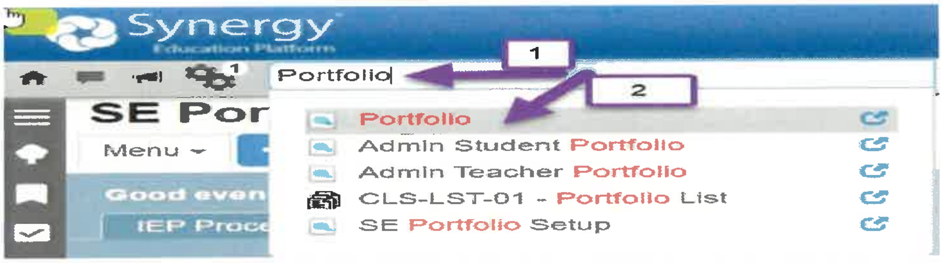

Change Focus
Year: 2020-2021
Organization: Big Lake Elementary
Mat-Su Borough School District
1 Elementary Schools
Big Lake Elementary
Butte Elementary
Cottonwood Creek Elementary
Dena'ina Elementary
Finger Lake Elementary
Goose Bay Elementary
Iditarod Elementary
Knik Elementary
Show Students: ○ Show Active Only
○ Show Inactive Only
● Show Active and Inactive
Save
Cancel

or

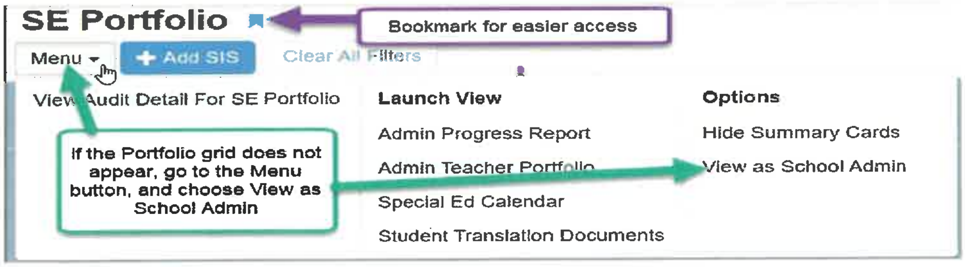

1 Elementary Schools
2 Middle Schools
3 High Schools
4 Non-Traditional Schools
5 Other Schools
6 Closed Schools
Academy Charter
American Charter Academy
Beryozova School
Big Lake Elementary
Lori Smith (Show Active and Inacti
t-Su Borough School Distri
ange Focus
2020-2021
Big Lake Elementary
gh School District
ry Schools
Elementary
mentary

Can also choose from the dropdown list

2. In the Quick Launch box type "Portfolio", and click the Portfolio page option in the list:


Synergy
Education Platform
Portfolio
1
2
SE Por
Menu
Good even
IEP Proce
Portfolio
Admin Student Portfolio
Admin Teacher Portfolio
CLS-LST-01 - Portfolio List
SE Portfolio Setup

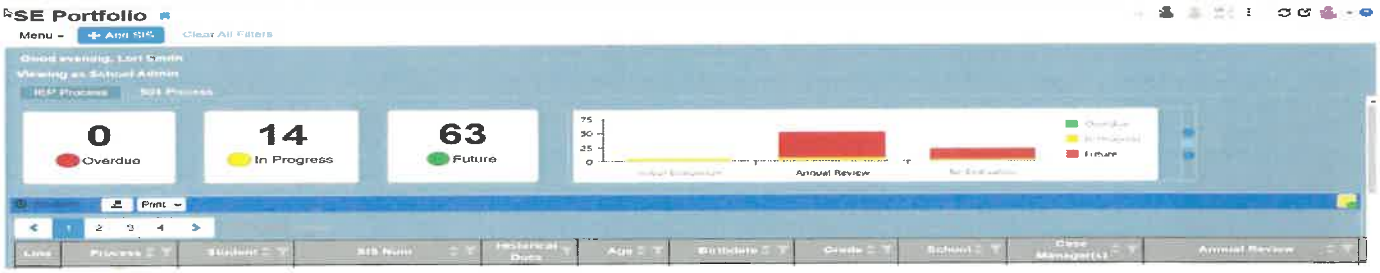
If Portfolio is not visible:


SE Portfolio
Menu
+ Add SIS
Clear All Filters
View Audit Detail For SE Portfolio
Launch View
Admin Progress Report
Admin Teacher Portfolio
Special Ed Calendar
Student Translation Documents
Options
Hide Summary Cards
View as School Admin

Bookmark for easier access

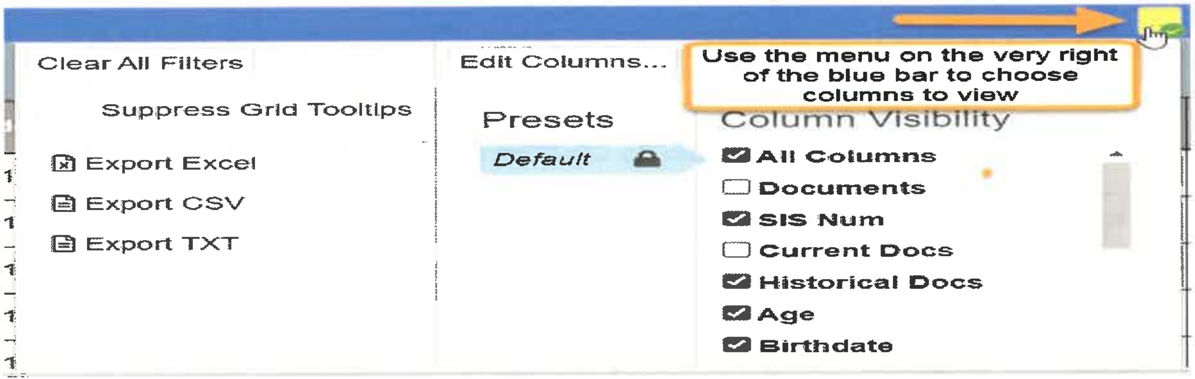
If the Portfolio grid does not appear, go to the Menu button, and choose View as School Admin

3. Portfolio will populate with student list and data for the school:


SE Portfolio
Menu
+ Add SIS
Clear All Filters
Good evening, Lori Smith
Viewing as School Admin
IEP Process
504 Process
0
Overdue
14
In Progress
63
Future
Annual Review
Overdue
In Progress
Future
Print
Line
Process
Student
SIS Num
Historical Data
Age
Birthdate
Grade
School
Case Manager(s)
Annual Review

6/22/21

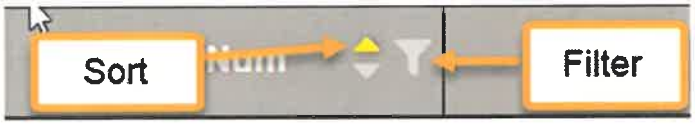
4. Choose the fields/columns you want to view in the grid:


Clear All Filters
Suppress Grid Tooltips
Export Excel
Export CSV
Export TXT
Edit Columns...
Presets
Default
Column Visibility

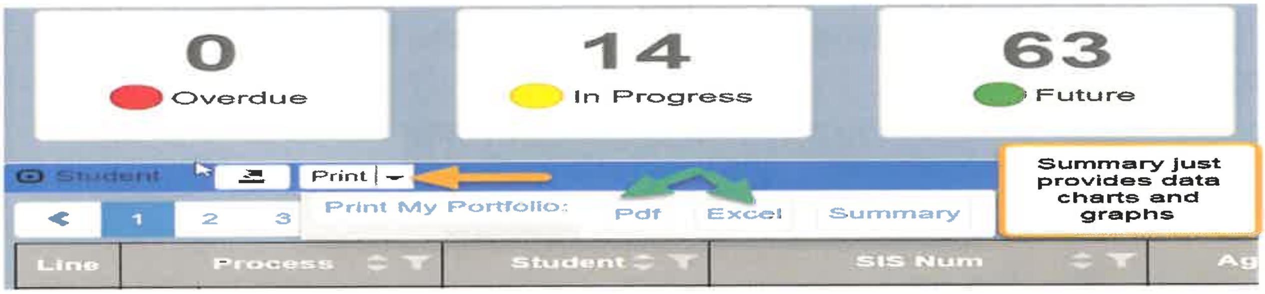
Use the menu on the very right of the blue bar to choose columns to view

☑ All Columns
☐ Documents
☑ SIS Num
☐ Current Docs
☑ Historical Docs
☑ Age
☑ Birthdate

5. Data in columns can be sorted and filtered, using the icons at the top of the columns:


Sort
Num
Filter

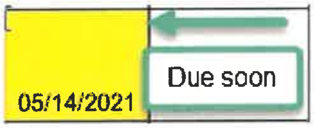
6. Once all fields are ready, choose Print, and the output type:


0
Overdue
14
In Progress
63
Future
Student
Print
1
2
3
Print My Portfolio:
Pdf
Excel
Summary
Line
Process
Student
SIS Num
Ag

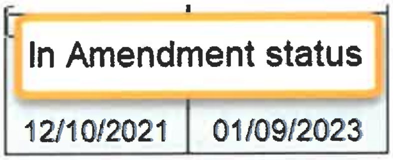
Summary just provides data charts and graphs

6. PDF will display the data in a grid form, with color coded alerts:

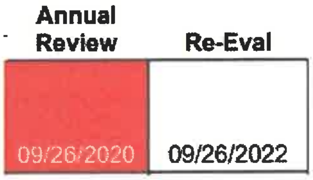
Yellow in the Annual Review and/or Re-Eval columns indicates upcoming dates:


05/14/2021
Due soon

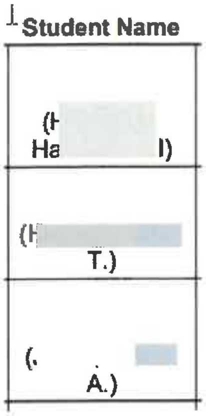
Blue across a student's gridline indicates an Amendment in process:


In Amendment status
12/10/2021
01/09/2023

Red indicates overdue (most likely not Finalized):


Annual Review
Re-Eval
09/26/2020
09/26/2022

7. Any student who has been dropped or withdrawn will have parenthesis around the name:



Student Name
([redacted])
([redacted])
([redacted])

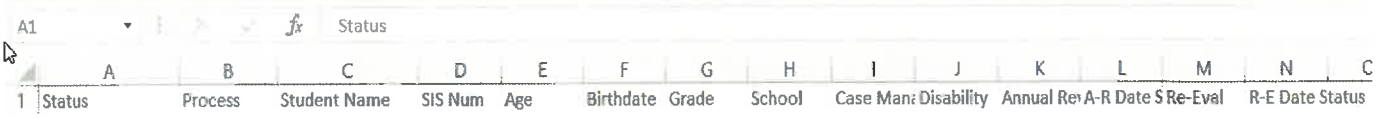
Check the Case Manager column:

-If the Case Manager is not at your school, most likely the student had been at/enrolled at your school at some time this school year, but is now enrolled elsewhere.

-If the Case Manager listed is at your school, check with them and the Registrar. The student will most likely need to be Exited from Synergy SE.

---

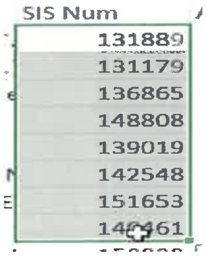
8. Excel will export to a traditional spreadsheet, which can be Sorted, Filtered, and columns and rows deleted as desired.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	C
1	Status	Process	Student Name	SIS Num	Age	Birthdate	Grade	School	Case Man:	Disability	Annual Re	A-R Date S	Re-Eval	R-E Date	Status

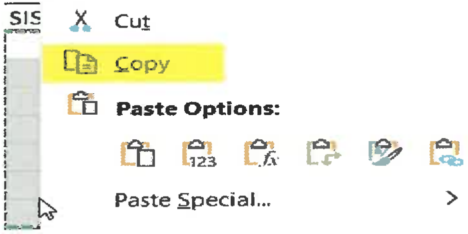
**Search tip when working with Excel and Synergy SE:

- Highlight Student ID numbers in the spreadsheet:

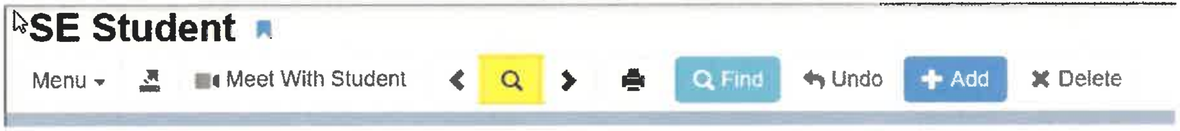


SIS Num
131889
131179
136865
148808
139019
142548
151653
14[illegible]461

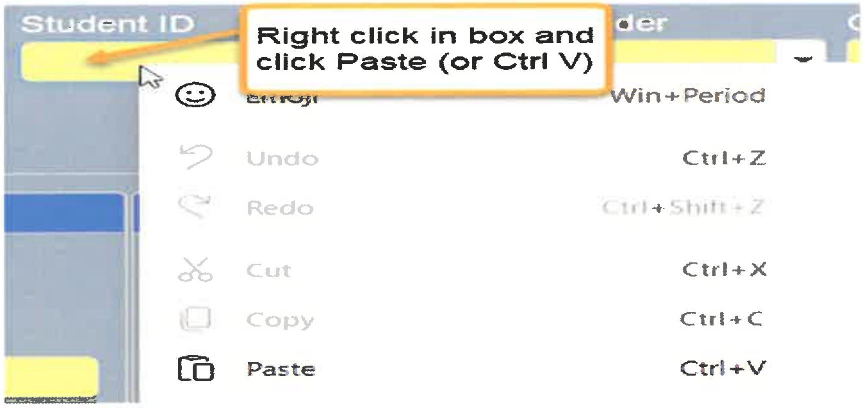
- Right click to Copy (Or use Ctrl C):



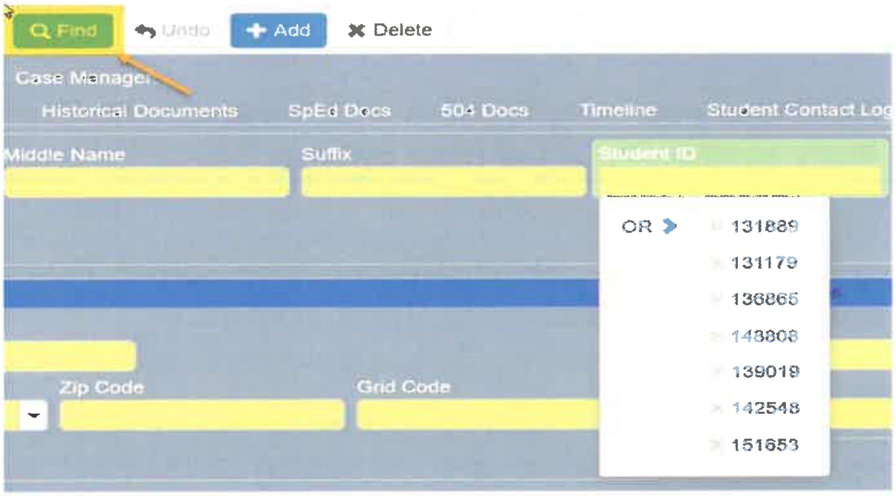
- Go to the SE Student screen in Synergy and click the magnifying glass:


SE Student
Menu
Meet With Student
Find
Undo
Add
Delete

- Paste the series of numbers into the Student ID box

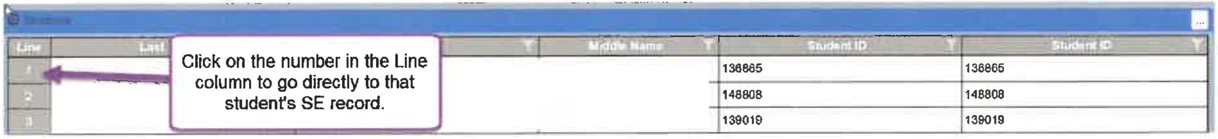

Right click in box and click Paste (or Ctrl V)
Student ID
der
Emoji
Win+Period
Undo
Ctrl+Z
Redo
Ctrl+Shift+Z
Cut
Ctrl+X
Copy
Ctrl+C
Paste
Ctrl+V

- Click Find:


Find
Undo
Add
Delete
Case Manager
Historical Documents
SpEd Docs
504 Docs
Timeline
Student Contact Log
Middle Name
Suffix
Student ID
OR
Zip Code
Grid Code

131889
131179
136865
148808
139019
142548
151653

- A screen will generate with a grid showing all the students:

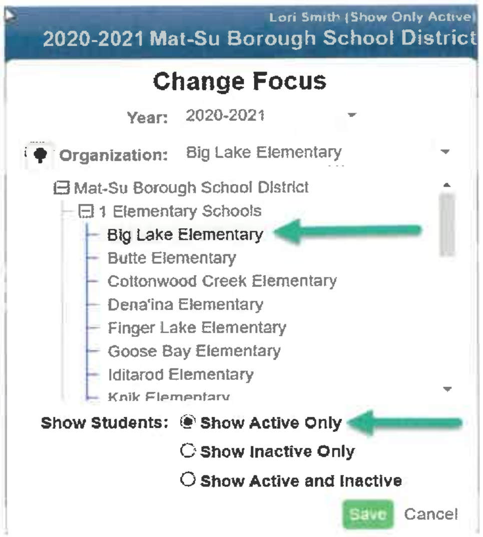

Click on the number in the Line column to go directly to that student's SE record.

Line	Last	Middle Name	Student ID	Student ID
1			136865	136865
2			148808	148808
3			139019	139019

*If you have two screens, the grid can be on one screen, and SE Student page on the other, making it easy to go from student to student in the grid list.

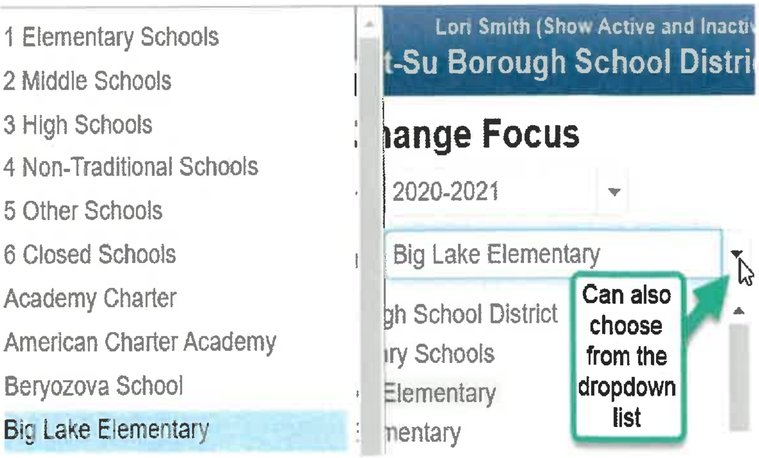
Finding ECDD Students Turning 9

1. Focus to a specific school site by using either the expandable Focus list or the dropdown menu, then under Show Students choose Show Active Only, and click Save:



Lori Smith (Show Only Active)
2020-2021 Mat-Su Borough School District
Change Focus
Year: 2020-2021
Organization: Big Lake Elementary
Mat-Su Borough School District
1 Elementary Schools
Big Lake Elementary
Butte Elementary
Cottonwood Creek Elementary
Dena'ina Elementary
Finger Lake Elementary
Goose Bay Elementary
Iditarod Elementary
Knik Elementary
Show Students: ● Show Active Only
○ Show Inactive Only
○ Show Active and Inactive
Save Cancel

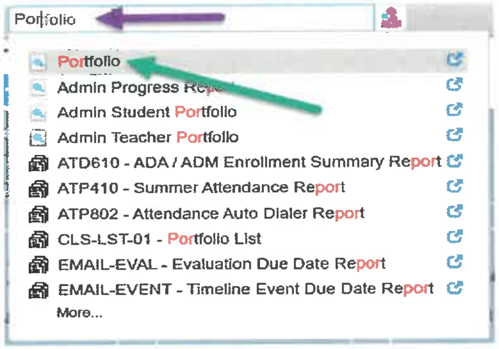
or



1 Elementary Schools
2 Middle Schools
3 High Schools
4 Non-Traditional Schools
5 Other Schools
6 Closed Schools
Academy Charter
American Charter Academy
Beryozova School
Big Lake Elementary
Lori Smith (Show Active and Inacti
t-Su Borough School Distri
ange Focus
2020-2021
Big Lake Elementary
gh School District
ry Schools
Elementary
mentary

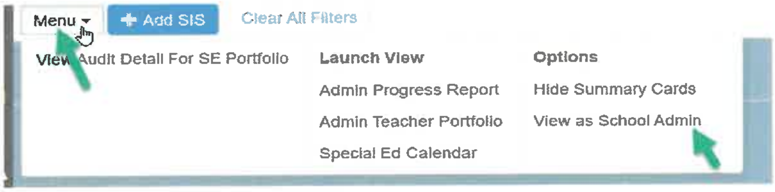
Can also choose from the dropdown list

2. Start typing Portfolio into the Quick Launch box, then choose Portfolio:



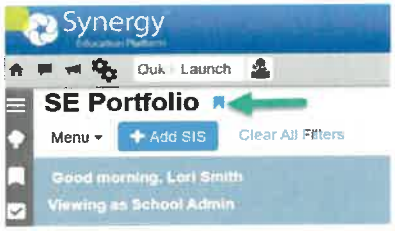
Portfolio
Portfolio
Admin Progress Rep
Admin Student Portfolio
Admin Teacher Portfolio
ATD610 - ADA / ADM Enrollment Summary Report
ATP410 - Summer Attendance Report
ATP802 - Attendance Auto Dialer Report
CLS-LST-01 - Portfolio List
EMAIL-EVAL - Evaluation Due Date Report
EMAIL-EVENT - Timeline Event Due Date Report
More...

3. If the Portfolio view does not appear, go to the Menu, and choose View as School Admin:



Menu
Add SIS
Clear All Filters
View Audit Detail For SE Portfolio
Launch View
Admin Progress Report
Admin Teacher Portfolio
Special Ed Calendar
Options
Hide Summary Cards
View as School Admin

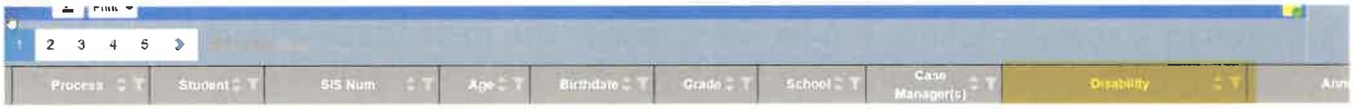
4. Once at the SE Portfolio appears, click the bookmark for easier access later, if using the bookmark feature:



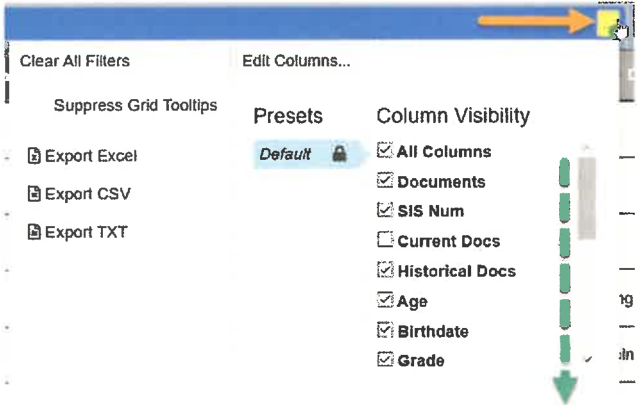
Synergy
Quick Launch
SE Portfolio
Menu
Add SIS
Clear All Filters
Good morning, Lori Smith
Viewing as School Admin

6/22/21

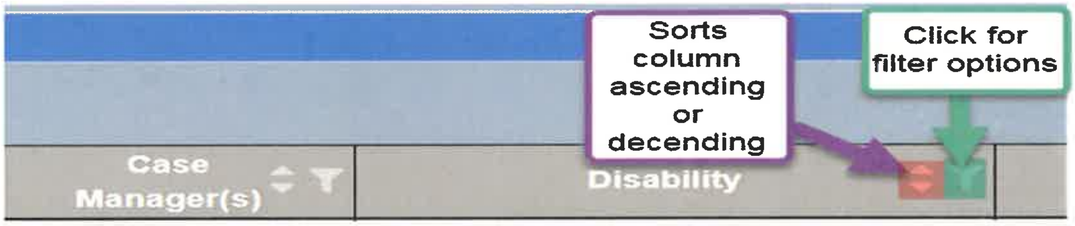
5. Locate the Disability Column in the Portfolio grid:


1 2 3 4 5
Process
Student
SIS Num
Age
Birthdate
Grade
School
Case Manager(s)
Disability

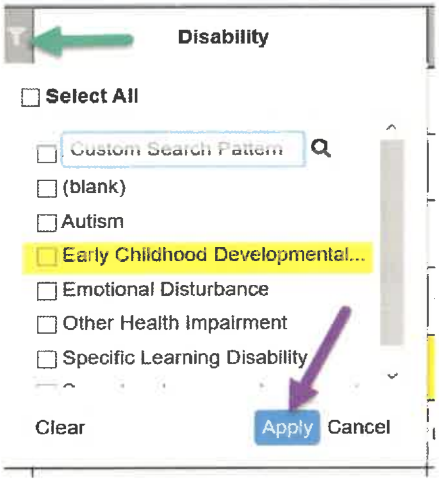
**If column is missing, find the Filter/Column menu button on the very right of the grid header. Hover over the yellow square and the options screen will pop up. Scroll to Disability and check the box to have it display in the grid:


Clear All Filters
Edit Columns...
Suppress Grid Tooltips
Presets
Column Visibility
Export Excel
Export CSV
Export TXT
Default
☑ All Columns
☑ Documents
☑ SIS Num
☐ Current Docs
☑ Historical Docs
☑ Age
☑ Birthdate
☑ Grade

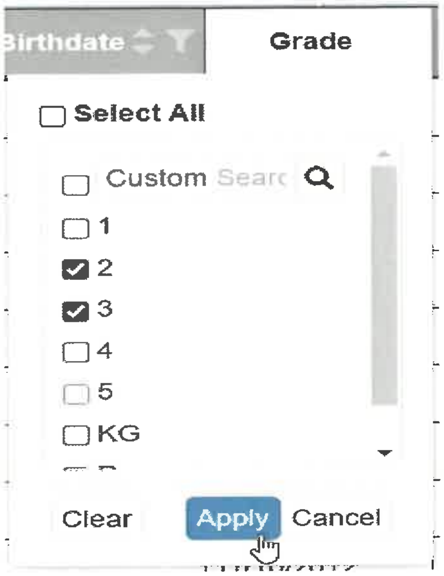
6. Click the Filter icon located on the right margin of the Disability column:


Sorts column ascending or decending
Click for filter options
Case Manager(s)
Disability

7. A box with all Disability options should open. Choose Early Childhood Developmental Delay, then click Apply. The grid will display all students with the category ECDD:


Disability
☐ Select All
☐ Custom Search Pattern
☐ (blank)
☐ Autism
☐ Early Childhood Developmental...
☐ Emotional Disturbance
☐ Other Health Impairment
☐ Specific Learning Disability
Clear
Apply
Cancel

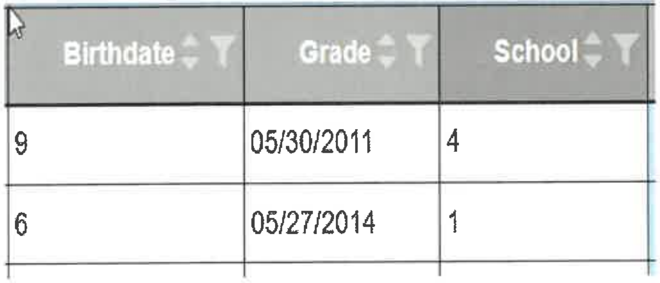
8. To further condense the list, go to the Grade column, click the Filter icon, and choose grade 2 and/or 3 (depending on your school population), and click Apply:



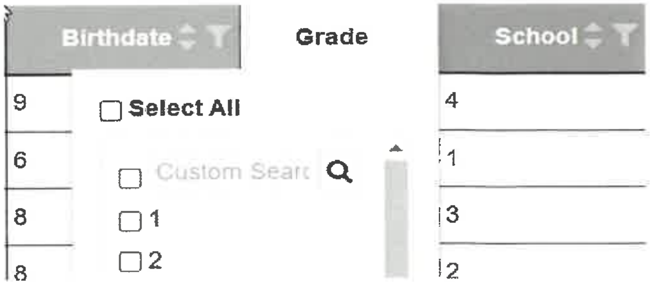
☐ Select All

☐ Custom Searc
☐ 1
☑ 2
☑ 3
☐ 4
☐ 5
☐ KG

**Warning: the column names do not always display above the right data. The Grade column may not have the matching data in it, but the filter remains tied to that column name/category:



Birthdate	Grade	School
9	05/30/2011	4
6	05/27/2014	1

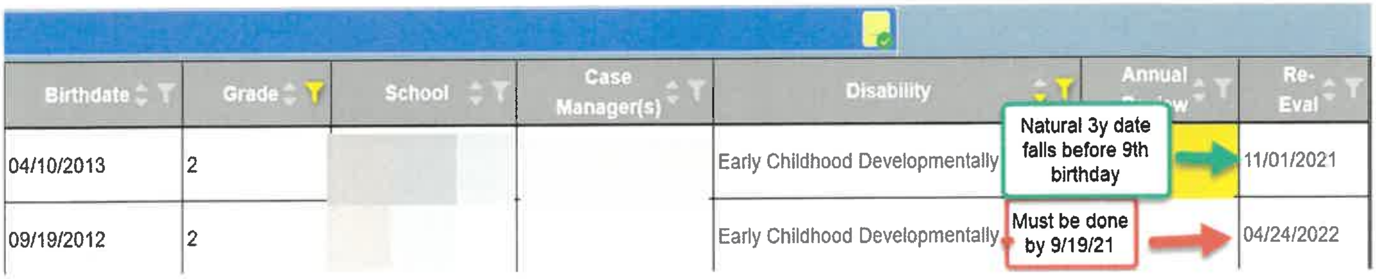


Birthdate	Grade	School
9		4
6		1
8		3
8		2

☐ Select All

☐ Custom Searc
☐ 1
☐ 2

9. Compare the Birthdates of those students with the dates in the Re-Eval column, and determine whether the evaluation due date will be the naturally occurring re-eval date, or is impacted by the 9th birthday.



Birthdate	Grade	School	Case Manager(s)	Disability	Annual Review	Re-Eval
04/10/2013	2	[redacted]		Early Childhood Developmentally		11/01/2021
09/19/2012	2	[redacted]		Early Childhood Developmentally		04/24/2022

Natural 3y date falls before 9th birthday

Must be done by 9/19/21

Glossary

Additional Assessment
When a student is currently receiving special education services, and the team agrees that there needs to be further evaluation to determine necessity for specific additional services, an additional assessment is conducted. Case manager initiates these additional assessments.

Behavioral Intervention Plan
A behavioral intervention plan is a set of positive behavioral interventions and supports, along with other strategies, designed to assist a student whose behavior impedes his own learning or the learning of others. Although the IDEA requires districts to consider the need for PBIS when a student's behavior impedes learning, it provides limited guidance as to when a BIP is required and does not provide any guidance as to the format or content of a BIP.

Case Load Report
This is a report generated to list the Case Manager's current assigned students. This list generates student names only if focused to the specific school. If the report is run while focused to the District level, the students names and attending school will be listed.

Case Manager/504 Coordinator
This person is the manager of all paperwork, and is responsible for meeting all timelines in special education and for Section 504 Plans. Case Managers and 504 Coordinators have Synergy SE access to the students for whom they are designated the case manager.

Checklists
These are invaluable and required to be submitted with each packet of paperwork submitted to Records Technician. They will assist you in knowing that all components of your paperwork are complete.

Classroom Observation
The Classroom Observation form is part of the Referral Packet. The classroom observation date should be filled out after the parent signs the Consent to Evaluate form. A certified staff member, who is not the student's general education teacher, must complete the Classroom Observation form.

Compliance Date or the "90 Calendar Days"
Once a Consent to Evaluate form is signed by the parent and received by the district, the team has **90 calendar days** to complete the evaluation and meet again **to implement the IEP** (Initial Evaluations and Additional Assessments). This includes in-service and parent teacher conference days and weekends. The Compliance Date is the date when the 90-calendar day deadline ends. The Records Technician will give the packet with the Compliance Date to all evaluators after the referral packet is processed.

District Representatives
District Representatives (Reps) are designated by the Director of Student Support Services or by the principal of each building.
District reps must meet the following criteria:

- Be qualified to provide or supervise special education services.
- Be knowledgeable about general curriculum.
- Be able to commit district resources

Does Not Qualify (DNQ) (Initial Evaluation)
Does Not Qualify means the student is not eligible for services. When a student is evaluated for the first time and "does not qualify", the ESER must still be filled out, meeting held by the compliance date, and signatures obtained. A Written Notice is required.

Eligibility Categories
The Eligibility Categories and their requirements are specified on the State of Alaska Special Education website under the Alaska Special Education Handbook link:
http://education.alaska.gov/tls/sped/Handbook.htm1
Each district in Alaska sets its own criteria for Learning Disability

ESER
Acronym for the Evaluation Summary and Eligibility Report. IEP Present Levels, Goals, and Services will be generated from the content of this report. The Needs and Recommendations of the ESER, found on the Summary/Participants tab, will drive the IEP content.

FAPE
Acronym for Free and Appropriate Public Education.

Foster Parent
If a child has been in the same foster home for a period of time, and it is reasonable to assume that the Office of Children's Services will not be moving the child to a different foster situation in the foreseeable future, then the foster parent may serve as the parent of a child for the purposes of special education. A Foster Parent Affirmation form should be completed by the guardian.

Functional Behavioral Assessment
The purpose of a functional behavioral assessment is to isolate a target behavior and to develop a hypothesis regarding the function of the target behavior. A target behavior is one that interferes with a student's ability to progress in the curriculum and to achieve the student's IEP goals. Once the target behavior is identified and the hypothesis developed, a positive behavior intervention plan can be prepared to address the target behavior with strategies and interventions, if necessary, or the target behavior can be addressed using a more informal approach.

Intensive Funding
Director of Student Support Services will make determinations of submission of students eligible for Intensive Funding. Student's services on IEP must meet all criteria as outlined in Alaska State Special Education Handbook.
Resource Specialists will work with special education providers to ensure that IEP meets all of these criteria. http://education.alaska.gov/tls/sped/Handbook.html

Individual Education Program (IEP)
The document that establishes a student's goals, services, supports, and accommodations needed to address the qualifying service areas in the Needs and Recommendations in the ESER. IEPs are reviewed annually. A flag will show on the Portfolio when a student is currently receiving special education services and the IEP is due within 90 days. The date box will be highlighted yellow.

Intensive Needs Programs
These programs serve students with multiple disabilities, and typically students are educated through a collaborative team approach, with therapy goals and activities becoming part of their daily schedule. Staffing in programs with intensive needs typically approaches a one-to-one ratio.

Intensive Resource Programs
These programs are non-categorical, and provide IEP services to students who have more than minimal needs. Typically these students have more than 900 minutes per week on their IEPs. Students do not need to qualify for these programs, placement decisions are made based on a student's amount and type of services, by the IEP team.
At times, a teacher who is identified as a resource teacher may provide services to students who have more than minimal needs, depending on the building staffing and assignment made by the building administrator.

Learning Disability: Mat-Su Borough School District Criteria
Elementary (Grades K-5): Eligibility for Specific Learning Disability for student's grades k–5 will be determined using progress monitoring data, benchmark assessment data, individual achievement testing results, as well as classroom observation. This data will determine whether the student meets criteria by having a discrepancy in performance and also in rate of improvement, which is insufficient to close the gap of achievement between the student and a typical peer.

Secondary (Grades 6-12): Eligibility for Specific Leaning Disability for student's grades 6-12 will be determined by a severe discrepancy method; using individual achievement testing results, and cognitive assessment results to determine whether there is a discrepancy of at least 15 points.

Portfolio: The SE Portfolio provides a list of all Special Ed and Section 504 Plan students connected to a specific school. Focus must be set to the school, and not to the District level. Annual Review and Reevaluation due dates are displayed, and will be highlighted yellow to prompt that the item is close to coming due. Date boxes turn red if the date has passed and either the meeting was missed, or the paperwork has not been Finalized. Initial Evaluations will have blank due date boxes until the paperwork is Finalized.

Portfolio List: This report lists the Case Manager's current caseload, along with important dates such as IEP annual due dates, and reevaluation due dates.

Prior Written Notice – PWN:
Outdated naming convention and acronym for Written Notice. Other Districts may still use this term.

Progress Monitoring
Consistent, regular progress monitoring is required for all students receiving instruction in reading, writing, and math. Weekly progress monitoring is most often appropriate for students receiving instruction in reading and math between grades K-8. Students enrolled in Read 180 will receive progress monitoring with the use of program assessments. At time of initial referral to special education, a progress monitoring report is required as documentation of general education interventions, unless school psychologist determines it is not necessary.

Records Specialist
This person either works at the school or is assigned to several schools. He/she is there to make sure compliance dates are met, and all Special Ed and 504 Plan paperwork is completed correctly. He/she may also help with setting up IEP and 504 Plan meetings. Not all schools are assigned a Records Specialist.

Records Technician
This person works at Central Administration in the Student Support Services Department. He/she is assigned to your school, and is there to process referrals, send and/or obtain records, and make sure all the paperwork is completed correctly.

Related Service
When Speech-Language, OT, PT, Counseling, etc. are provided in addition to the academic support, it is a related service. Related services must be necessary for the student to benefit from his or her special education Program.

Resource Programs
These programs are non-categorical, and provide IEP services to students who have minimal to moderate needs. Typically these students have less than 900 minutes per week on their IEPs, and may include goals addressing academics, attention, and behavior. Students do not qualify for these programs, placement decisions are made based on a student's amount and type of services, by the IEP team.

Resource Specialist
Certified Resource Specialists, work out of the SSS department at Central Administration. This is the person you ask all questions of relating to, placement options/changes, program consultation, clarification of SPED legal issues, clarification of procedures, dispute resolution, etc. The Resource Specialist can answer questions about the paperwork, or provide guidance concerning difficult situations. In cases where a child requires several services and/or an intensive placement, it is advisable to have a resource specialist at the meeting.

Section 504 Accommodation Plan
A 504 plan is intended for children with disabilities who do not need or qualify for special education, but could benefit from accommodations and/or specialized help in school.

Secondary Transition
The IEP Team must view transition planning as the focus of the IEP during the IEP developed before the student is age 16. Transition planning is an integral component of the IEP, rather than a single or separate event in the IEP process. The IEP forms require IEP Teams to identify the student's desired post-school outcomes before proceeding to the other IEP components. Written permission to invite out-of-district agency staff must be obtained prior to IEP meeting.

Self-contained Programs
These programs are non-categorical, and provide services to students with a majority of their time in school needing to be modified from the general curriculum. Many of these students' IEP's focus on behavioral goals, or on life skills. Students do not qualify for these programs. Placement decisions are made based on a student's amount and type of services by the IEP team.

Special Education Service
These are described in the IEP, Section 10. Academic supports and Adapted PE are always special education services, not related services. Special education services must be necessary for the student to benefit from his or her Regular Educational Program.

Speech Language Impairment
Students identified with a Speech or Language Impairment may have deficits on areas such as articulation, phonology, or functional communication.

Speech and Language Services
Speech-Language Services is the only service that can be either a special education or a related service. Under certain circumstances to be approved by the Director of Student Support Services, a related service may be the only service a child receives (i.e. OT, PT). This would then be considered the special education service for that student.

Student Support Services (SSS)
Includes Special Education and 504 Accommodation Plans. Student Support Services is located at the Central Administration building, 501 N. Gulkana, Palmer, AK 99645. All requests for Special Education and 504 Plan records are processed through Student Support Services.

Surrogate Parent
In some situations, children may be residing with adults other than parents and relatives who are not filling the role of foster parent. In these unique situations, a surrogate parent must represent the child. Relatives may be considered as potential surrogates and be appointed. All potential surrogate parents must undergo mandated training with the district. The Director of Student Support Services appoints all Surrogate Parents.

Three-Year Re-Evaluations
A flag will show on the Portfolio when a student is currently receiving special education services, and three-year evaluation is due within 90 days. The date box will be highlighted yellow. *If cognitive testing is required for their eligibility category, then a cognitive test must have been administered within the last six years.* If the student is evaluated and doesn't qualify, the student is exited from Special Ed as No Longer Eligible.

Vision and Hearing Screening
Results of these screenings are to be documented on the referral form, not on the ESER. These are performed by the school nurse, and do not require parent consent. Exception will be Childfind ESERS.

Working Files
Working Files are the student files kept at the student's school and maintained by that building staff.

Written Notice (WN)
IDEA requires that the district provide the parent with a Written Notice any time the district proposes or refuses to initiate or change the identification, evaluation, placement, or IEP. This WN is to reflect what action will occur following the IEP meeting; not what will occur at the meeting.