

# I-Star IEP

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Welcome to the Illinois State Board of Education's online IEP system, I-Star (IEP Special Education Tracking and Reporting).

Illinois's online IEP is fully integrated with SIS (Student Information System), EIS (Educator Information System), and ELIS (Educator Licensure Information System). The system is accessed through IWAS (ISBE Web Application Security) so each user will need an IWAS account. If you do not have an IWAS account, visit the [IWAS User Guide](#).

# I-Star IEP Administrator Guide

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This portion of the User Guide is for administrators who will be managing security for I-Star users. This part of the guide should be completed before staff IEP training.

## Checklist to Prepare

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Before receiving an I-Star training the following steps need to be performed for a successful experience:

- All staff that will require access to I-Star must have an IWAS account.
- All District Superintendents or Coop Administrators must assign security roles.
- All students must have a SIS ID, including PreK students and other students served in a community.
- SIS ID's batch uploads must be done daily.
- Personnel must have IEIN number. Social Security numbers will not be accepted.

## IWAS Account

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There are two layers of security when using the I-Star system.

1. The first layer is provided by IWAS (ISBE Web Application System)
2. The second layer is provided inside the I-Star System

Before being assigned a role in the IEP system, you must create an IWAS account to establish authorization to use ISBE systems.

Many ISBE web applications are accessed through IWAS for security and convenience.

Access IWAS using Steps 1-4 below:

**Step 1:** Click the link <https://www.isbe.net/> to access the Illinois State Board of Education Website.

**Step 2:** Click on the **Administrators** tab.



**Step 3:** Click **Log in to IWAS**.



**Step 4:** For guidance on setting up an IWAS account you may access the *IWAS User Guide* located in the link below OR select **IWAS User Guide** from the IWAS page:

<https://sec1.isbe.net/iwas/documents/pdf/IWASUserGuide.pdf>

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James T. Meeks, Chairman Tony Smith, Ph.D., State Superintendent

**ISBE Home**  
**Home**  
**Sign Up Now**  
**Get Password**  
**Contact Us**  
**Help**  
**[WAS User Guide](#)**  
**[WAS Training Video](#)**

**Already have an account? Login Here :**

**Login Name**   
**Password**

Remember Login Name

**LOG IN**

**Forgot Your Password?**  
If you have forgotten your login name or password, click on the link below.

**[Find Login/Password](#)**

**New Partner - Sign up Now**

Some ISBE web-based systems require electronic signatures. You can create your own logon id and password by clicking on the following link. After you establish your logon, you will then have the ability to request authorization to use ISBE's systems.

**[Sign Up Now](#)**

**Need Help?**  
If you need help with logging in, the sign up procedure or your password, please click on the link below.

**[Help](#)**

This web site has been optimized for Internet Explorer 6.0 or above / Firefox 2.0 or above. You can download the latest version of these browsers by clicking on the following icons.

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**Step 5:** Once the IWAS account is obtained, the user will follow the instructions in the **IWAS User Guide** to request access to I-Star Application.

# I-Star Application

**Step 1:** After requesting access to I-Star application in IWAS, *I-Star* can be accessed under **System Listing > Reporting > Annual > I -Star (Special Education)**.

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My Systems

Below are systems that you are either authorized to use or are awaiting authorization from either your district (Pending-District), ROE (Pending-ROE) or ISBE (Pending-ISBE). Once you are "Authorized" to access a system, simply click on the system description to use it.

[Click Here for Due Dates](#)

Categories - Click to Expand/Collapse Tree	Authorization
Reporting	
Annual	
I - Star (Special Education) - Training	Authorized

Legend: ⓘ : System Description - Detailed 📅 : Due Dates 👤 : Profile

[Want to Signup for Other Systems?](#)

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**Step 2:** The user will notice the I-Star application authorization will be *Pending*. Once the user is *Authorized* to access I-Star, simply click on the system name to use it.

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James T. Meeks, Chairman Tony Smith, Ph.D., State Superintendent

My Systems

Below are systems that you are either authorized to use or are awaiting authorization from either your district (Pending-District), ROE (Pending-ROE) or ISBE (Pending-ISBE). Once you are "Authorized" to access a system, simply click on the system description to use it.

[Click Here for Due Dates](#)

Categories - Click to Expand/Collapse Tree	Authorization
Reporting	
Annual	
I - Star (Special Education) - Training	Authorized

Legend: ⓘ : System Description - Detailed 📅 : Due Dates 👤 : Profile

[Want to Signup for Other Systems?](#)

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**Step 3:** This will redirect the user to the I-Star Landing Page.

NOTE: The Landing Page will differ for users based on their security role in the system. Some users may have access to administrative portions of the system while others may not. Below is an example of what the Landing Page may look like:

The screenshot displays the I-Star user interface. At the top left is the Illinois State Board of Education logo. The user is identified as Train09Olivia Gray (Train09IStar) District User. The navigation menu includes Home, Approvals and Claims, IEP, Admin, Goal Mine, Facility Search, IEP Quality, Reports, and User Guide. The main content area is divided into several sections:

- Welcome District User:** Greeting for Train09Olivia Gray, Harrisburg CUSD 3, with a thank you message and a welcome to I-Star.
- My IEP Students:** A table listing students with columns for SISID, Name, IEP Status / Start, Home School, and IEP Case Manager.
 

SISID	Name	IEP Status / Start	Home School	IEP Case Manager
999999021	DemoRiley Seffron Bennett	Draft		
999999067	DemoTucker Gregor Nelson	Draft	Harrisburg CUSD 3	
999999002	DemoOcean Teresa Rodriguez	Draft	Harrisburg CUSD 3	
999999081	DemoMckenzie Magda Watson	Official 5/15/2018	Harrisburg CUSD 3	★
999999003	DemoWilliam Roy Young	Draft	Harrisburg CUSD 3	★
- Request Access:** A link to request a change to security settings.
- Search for an IEP Student:** A link to the student search function.
- Approvals and Claims:** A link to the claims section.
- 2019 School year Student records with fatal errors: 7:** A link to view student records with errors.
- Current Child Count Status:** A link to get updated child count numbers.
- SPP 14: Post School Outcome Surveys:** A link to outcome surveys.
- Meetings:** A section for viewing upcoming meetings, currently showing "No Records Found".
- Reminders:** A section for viewing future reminders, currently showing "No Records Found".


# I-Star User Roles/Requests

NOTE: District or cooperative administrators can assign security roles to all users OR the users can request the type of role they desire for approval/denial.

**Option A:** If you are a district or cooperative administrator and would like to assign security roles to all users please see [Assign Security Roles](#) tab.

**Option B:** If you know the level of access that you need in I-Star, you can submit a security request and the request will be reviewed and approved/denied by your district or coop administrator. Submit a security request within I-Star by clicking on the **Request Access** link on the Landing Page. See instructions below for Option B:

**Step 1:** From the Landing Page click **Request Access**.



## Request Access

Are you not seeing a list of students? Use this link to request a change to your I-Star security settings.

**Step 2:** Click **Modify**.

### User's Assigned System Roles ( Modify )

**Step 3:** You will be able to see your current access, if any, and request access if needed.

User's Assigned System Roles (Clear)					
District Security Administrator (Clear)			IEP Case Management Tool (Clear)		
Request Access	Current Access	Role Name	Request Access	Current Access	Role Name
<input type="radio"/>	<input type="radio"/>	District Security Administrator	<input type="radio"/>	<input type="radio"/>	IEP Basic Access ?
<input type="radio"/>	<input checked="" type="radio"/>		<input type="radio"/>	<input checked="" type="radio"/>	IEP Administrator Access ?
<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	IEP Read-Only Access ?
Personnel Approvals (Clear)			Personnel Approvals / Claims Import (Clear)		
Request Access	Current Access	Role Name	Request Access	Current Access	Role Name
<input type="radio"/>	<input checked="" type="radio"/>	Personnel Approvals Full Access	<input type="radio"/>	<input checked="" type="radio"/>	Import Personnel Claims Full Access
<input type="radio"/>	<input type="radio"/>	Personnel Approvals Read Only	<input type="radio"/>	<input type="radio"/>	Import Personnel Claims Read Only
Personnel Claims (Clear)			Student Approvals (Clear)		
Request Access	Current Access	Role Name	Request Access	Current Access	Role Name
<input type="radio"/>	<input checked="" type="radio"/>	Personnel Claims Full Access	<input type="radio"/>	<input type="radio"/>	Student Approvals Full Access
<input type="radio"/>	<input type="radio"/>	Personnel Claims Read Only	<input type="radio"/>	<input type="radio"/>	Student Approvals Read Only
Student Claims (Clear)					
Request Access	Current Access	Role Name			
<input type="radio"/>	<input type="radio"/>	Student Claims Full Access			
<input type="radio"/>	<input type="radio"/>	Student Claims Read Only			



NOTE: Click the question mark icon to view descriptions of these roles.

IEP Case Management Tool (Clear)	
Current Access	Role Name
<input type="radio"/>	IEP Basic Access ?
<input checked="" type="radio"/>	IEP Administrator Access ?
<input type="radio"/>	IEP Read-Only Access ?

Evaluate the roles and click **Continue**.

### IEP Case Management Access Levels

**I. IEP Administrator Access**

- a. Create IEPs
- b. Search for students
- c. Modify an IEP Access List
- d. Manage Form Contacts, Letterheads, Coversheets, and Common Users
- e. Access and modify IEPs when listed on the IEP Access List

**II. IEP Basic Access:**

- a. Access and modify IEPs when listed on the IEP Access List

**III. IEP Read-Only Access:**

- a. Read-only access to IEPs when listed on the IEP Access List

**Step 4:** Once you have selected the desired access level, select the **Save** radio button.

Save - Please save this request.

Cancel - Please exit the wizard.

**Step 5:** Once a security request is submitted, the message on your landing page will change from *Request Access* to *Review Your Security Request*.



### Review Your Security Request

You recently submitted a request to modify your access. Use this link to view/modify your request.

**Step 6:** Security request approval is performed by a district or cooperative administrator. See instructions at [Approve/Deny a Security Request](#).

## Approve/Deny a Security Request

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From the Landing Page of I-Star, the district or cooperative administrator will take the following steps below to approve/deny a security request:

**Step 1:** Click **Approve/Deny a Security Request**.



**Step 2:** Click the **Security Requests** tab.



**Step 3:** Click the icon to review the request.



**Step 4:** Review the request and click **Approve** or **Deny**.



**Step 5:** Click the **Save** radio button and then click **Save**.



## Assign Security Roles

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This layer of security allows a district or coop administrator to assign specific roles to I-Star users.

Once all of your I-Star users have established IWAS accounts and [logged into I-Star at least once](#), the district or cooperative administrator can assign security roles to all the users on their behalf.

To assign specific roles to I-Star users follow the steps below:

**Step 1:** From the Landing Page, click **Manage Security**.



NOTE: The User List will have two tabs:

### 1. Manage Security

a. This tab will show all users assigned to your district(s).

### 2. Security Request

a. This tab shows any users who have requested a user role. See [Approve/Deny a Security Request](#).

b. If a district or coop administrator has not assigned a security role to a user, see [I-Star User Roles/Requests](#).

Manage Security Security Requests (0)

User Name Filter: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Load

Iwas UserId	Full Name	Entity	Email	Approval Group	Logged In	Roles	Is Active
1		Ohio Valley Sp Ed		District Admin	<input type="checkbox"/>	<b>Role Name</b> Personnel Approvals Full Access Personnel Claims Full Access IEP Administrator Access District Security Administrator Import Personnel Claims Full Access	True
		Norris City Annex		Document Author	<input type="checkbox"/>	<b>Role Name</b> Personnel Approvals Full Access Personnel Claims Full Access Student Approvals Full Access Student Claims Full Access IEP Administrator Access District Security Administrator Import Personnel Claims Full Access	True



**Step 2:** Select a user in the *IWAS UserID* list.

Iwas UserId
wovsedDistDoc1
wovsedDistDoc2
wovsedDistDoc3

**Step 3:** Click **Modify** to edit the security role for the user.

**User's Assigned System Roles** 

**Step 4:** Click the question mark icon for a description of the 3 security roles.

IEP Case Management Tool (Clear)	
Current Access	Role Name
<input type="radio"/>	IEP Basic Access 
<input type="radio"/>	IEP Administrator Access 
<input type="radio"/>	IEP Read-Only Access 

**Step 5:** Evaluate the roles and click **Continue**.

### IEP Case Management Access Levels

**I. IEP Administrator Access**

- a. Create IEPs
- b. Search for students
- c. Modify an IEP Access List
- d. Manage Form Contacts, Letterheads, Coversheets, and Common Users
- e. Access and modify IEPs when listed on the IEP Access List

**II. IEP Basic Access:**

- a. Access and modify IEPs when listed on the IEP Access List

**III. IEP Read-Only Access:**

- a. Read-only access to IEPs when listed on the IEP Access List

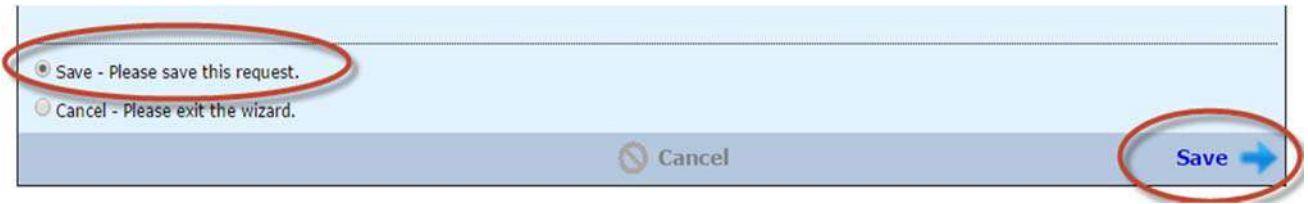
**Step 6:** Select the type of role that you would like this user to have by clicking the appropriate button in the *Current Access* column.

Current Access
<input type="radio"/>
<input checked="" type="radio"/>
<input type="radio"/>

**Step 7:** District superintendents and/or cooperative directors are the only IWAS users that can manage security in the IWAS system. Since this may be a time-consuming task, they may delegate this responsibility to another user or users in their district or cooperative for I-Star. Select the button under the current access column under the *District Security Administrator* box.

District Security Administrator (Clear)	
Current Access	Role Name
<input checked="" type="radio"/>	District Security Administrator

**Step 8:** Click the **Save** radio button and click **Save**.



A screenshot of a wizard interface. At the top, there are two radio buttons: the first is selected and labeled "Save - Please save this request.", and the second is unselected and labeled "Cancel - Please exit the wizard." Below these is a "Cancel" button with a greyed-out icon. On the right side, there is a "Save" button with a blue arrow icon. Red circles highlight the selected radio button and the "Save" button.

**Step 9:** Click **User List** to continue managing security for other users.



A screenshot of a navigation menu. The menu items are: Home, Approvals and Claims, IEP, Admin, Goal Mine, Facility Search, IEP Quality, Reports, and User Guide. The "Admin" item is expanded, showing a dropdown menu with "User List" and "District Maintenance". The "User List" item is highlighted with a red box. Below the menu, there is a search bar with "y Requests (0)" and a "Load" button. Below the search bar is a table with the following columns: UserId, Full Name, Entity, Email, Approval Group, and Logged In. The table is titled "Users by Name".

NOTE: To request a security role, see [I-Star User Roles](#).

# Landing Page

Once you have logged into IWAS, requested access to I-Star and established your security role in I-Star, you will see the I-Star Landing Page.

The system menu at the top of the Landing Page is used throughout the entire I-Star system and will be similar for all users.

NOTE: The Landing Page will differ for users based on their security role in the system. This is an example of what the Landing Page may look like. Some users may have access to administrative portions of the system while others may not.

**Illinois State Board of Education** | **I-Star** | Train09Olivia Gray (Train09IStar) District User | 59:26

Home | Approvals and Claims | IEP | Admin | Goal Mine | Facility Search | IEP Quality | Reports | User Guide

Welcome District User  
**Train09Olivia Gray**  
 Harrisburg CUSD 3

Thank you for using the I-Star training system.

Welcome to I-Star. Please feel free to share all questions, concerns and comments that you have with us [here](#). Your input is very valuable to us.

SISID	Name	IEP Status / Start	Home School	IEP Case Manager
999999021	DemoRiley Saffron Bennett	Draft		
999999067	DemoTucker Gregor Nelson	Draft	Harrisburg CUSD 3	
999999002	DemoOcean Teresa Rodriguez	Draft	Harrisburg CUSD 3	
999999081	DemoMckenzie Magda Watson	Official 5/16/2018	Harrisburg CUSD 3	★
999999003	DemoWilliam Roy Young	Draft	Harrisburg CUSD 3	★

(Page 1 of 1) | Page 1 | Items Per Page 20

View All

**Request Access**  
 Are you not seeing a list of students? Use this link to request a change to your I-Star security settings.

**Search for an IEP Student**  
 Use this quick link to go to the Student Search.

**Approvals and Claims**  
 Use this quick link to go to Claims

**2019 School year Student records with fatal errors: 7**  
 Use this quick link to go to Student

**Current Child Count Status**  
 Use this link to get updated Child Count numbers

**SPP 14: Post School Outcome Surveys**

**Meetings** | Meetings for: Today  
 You will see a list of upcoming meetings here if you were listed as a meeting attendee. You can look for upcoming meetings up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date
No Records Found	

**Reminders** | Reminders for: Today  
 You will see a list of reminders that you have set up. You can look for future reminders up to 4 weeks by changing the selection in the dropdown that is present in the header.

Name	Subject	Date	Description
No Records Found			



# Special Needs Definition

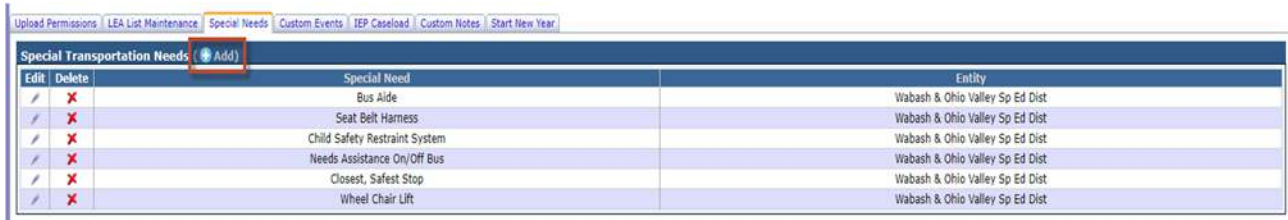
## Special Needs Definition

*Special Needs Definition* is where you can set up your special needs for the drop-downs on the special transportation section of the student's profile.

**Step 1:** To add a *Special Needs Definition* from the **Admin** drop-down menu, click **District Maintenance** and **Special Needs**.
















**Step 2:** To add a new special needs definition, click **Add** next to *Special Transportation Needs*.



**Step 3:** Enter the new *Special Need* and click **Save**.



**Step 4:** The new definition will show up in your list. To edit a definition, click the pencil icon. To delete, click the red **X**.

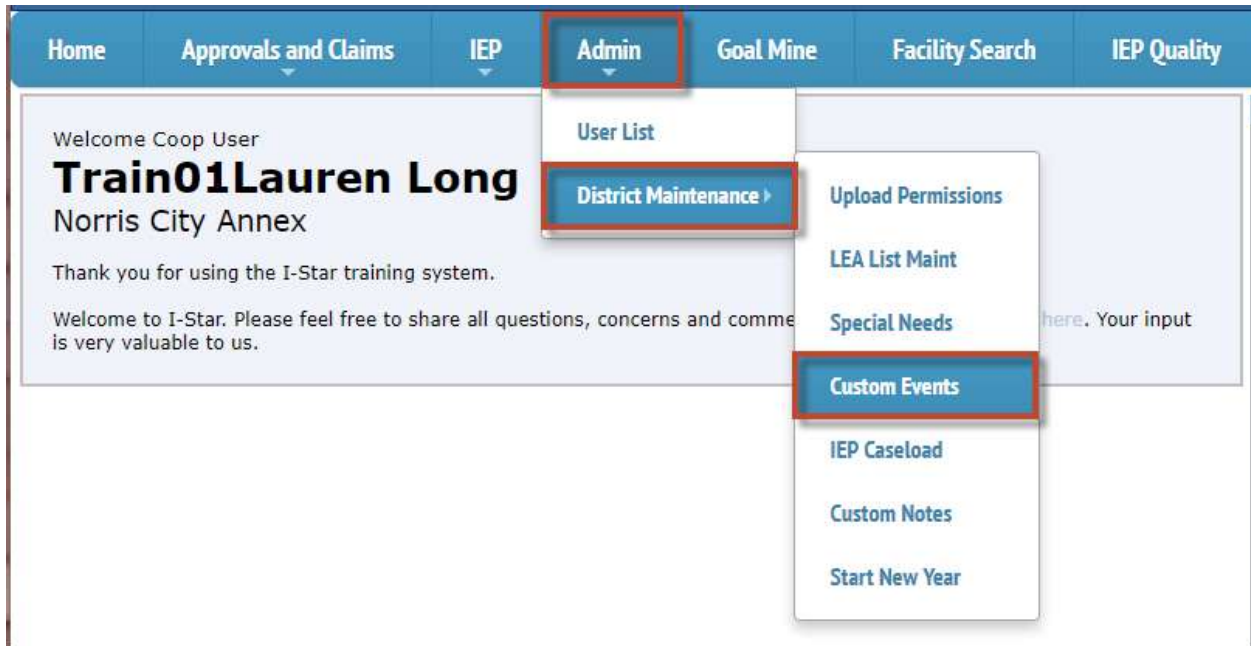
Special Transportation Needs (  Add)			
Edit	Delete	Special Need	Entity
		Bus Aide	Wabash & Ohio Valley Sp Ed Dist
		Seat Belt Harness	Wabash & Ohio Valley Sp Ed Dist
		Child Safety Restraint System	Wabash & Ohio Valley Sp Ed Dist
		Needs Assistance On/Off Bus	Wabash & Ohio Valley Sp Ed Dist
		Closest, Safest Stop	Wabash & Ohio Valley Sp Ed Dist
		Wheel Chair Lift	Wabash & Ohio Valley Sp Ed Dist

# Custom Events

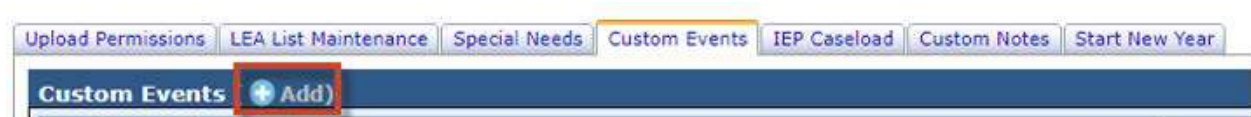
## Custom Events

The *Custom Events* tab is where you can set up your custom events for the drop-downs on the *Event Type* section of the student's profile.

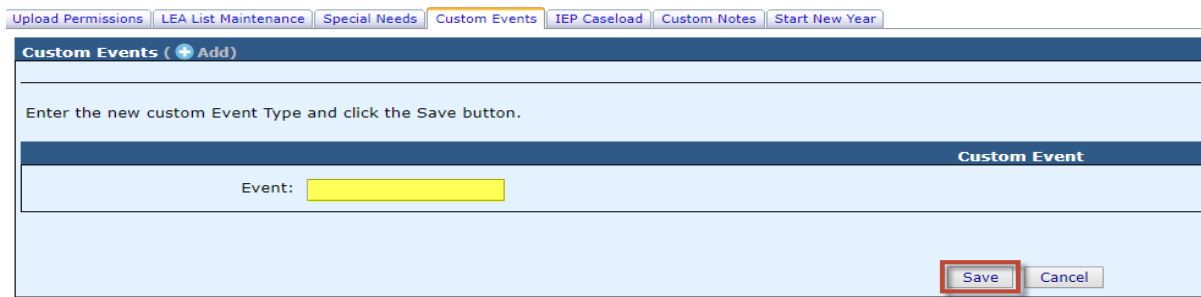
**Step 1:** To add a Custom Event from the **Admin** drop-down menu, click **District Maintenance** and **Custom Events**.



**Step 2:** To add a new *Event Type*, click **Add** next to *Custom Events*.



**Step 3:** Enter the new custom *Event Type* and click the **Save** button.



# Custom Notes

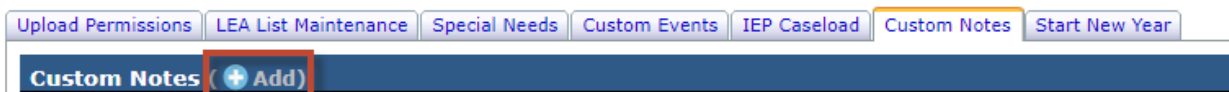
## Custom Notes

The *Custom Events* tab is where you can set up your custom events for the drop-downs on the *Note Type* section of the student's profile.

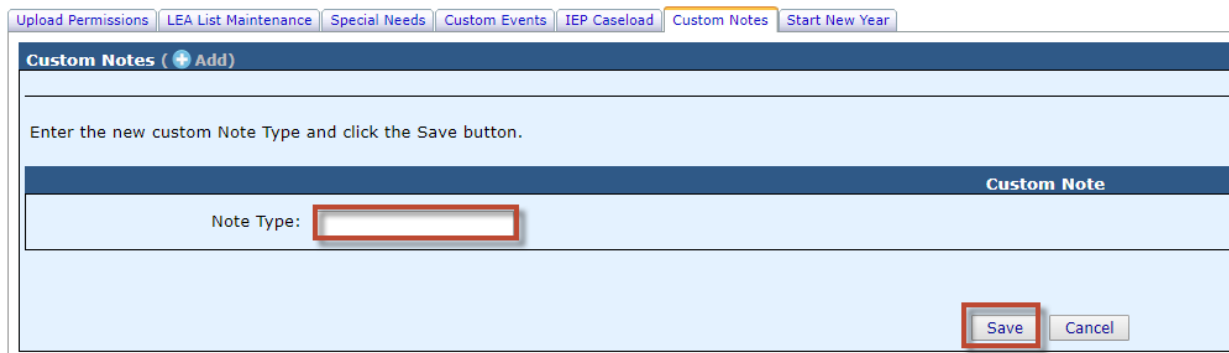
**Step 1:** To add a Custom Event from the **Admin** drop-down menu, click **District Maintenance** and **Custom Notes**.



**Step 2:** To add a new *Note Type*, click **Add** next to *Custom Notes*.



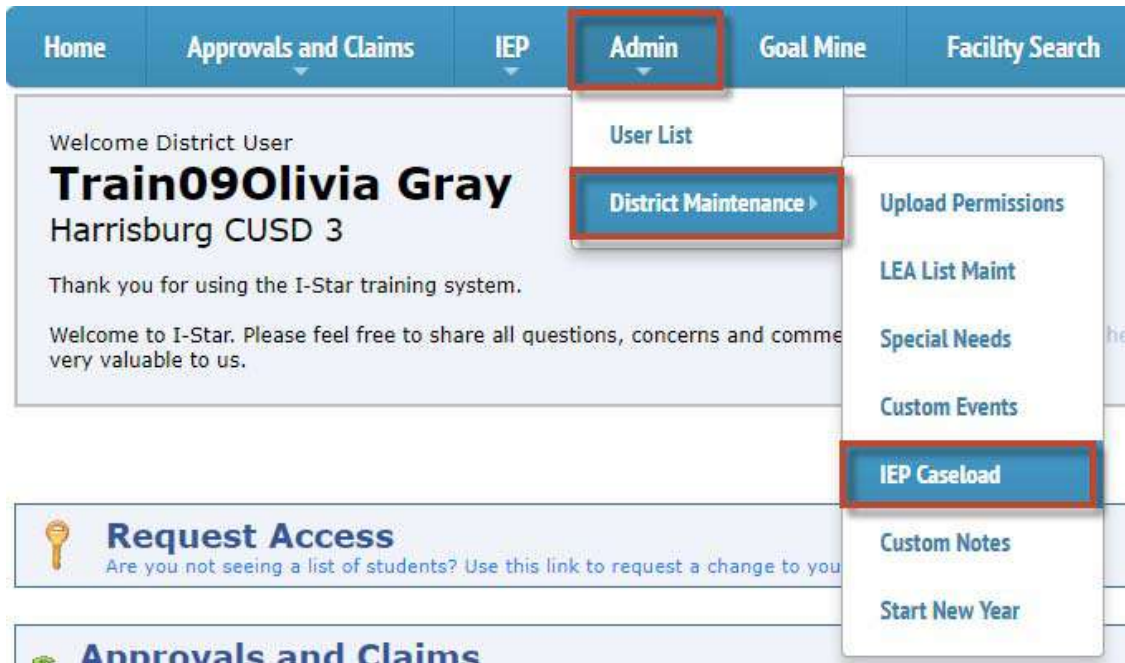
**Step 3:** Enter the new custom *Note Type* and click the **Save** button.



# IEP Caseload

The IEP Case Load Management tab allows users to update caseloads for staff more efficiently than visiting each IEP to update the access list.

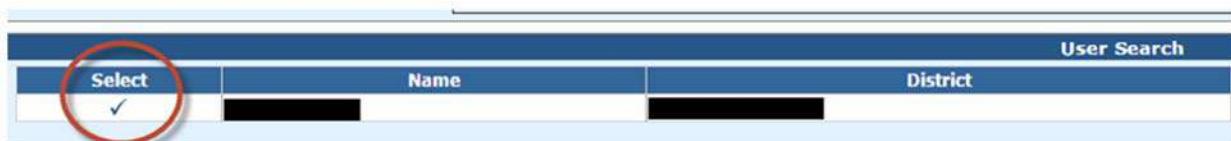
**Step 1:** From the **Admin** drop-down menu, click **District Maintenance** and **IEP Caseload**.



**Step 2:** Enter the *First Name* and *Last Name* for the I-Star user that need added to the Access List and click **Search**.



**Step 3:** Click the checkmark to the left of the user's name.



NOTE: To take this student off of the staff member's case load, follow steps 3a-3b.

**Step 3a:** Select a student.

Select	SIS Id	Name
<input type="checkbox"/>	999999010	DemoSabine Isa Adams
<input type="checkbox"/>	999999116	DemoRiver Yusuf Bell
<input type="checkbox"/>	999999005	DemoJorge Mark Ross
<input type="checkbox"/>	999999013	DemoMack Wade Smith

(Page 1 of 1)

**Step 3b:** Click **Remove**.

**Remove** - Remove user from the selected student's IEP access list.

**Replace User** - Update selected student's IEP access list with new user.

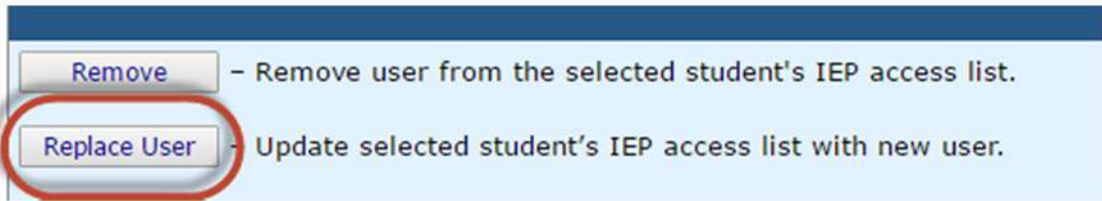
NOTE: To take this student off of the staff member's case load and add it to another, follow steps 3c-3d.

**Step 3c:** Select the student.

Select	SIS Id	Name
<input type="checkbox"/>	999999010	DemoSabine Isa Adams
<input type="checkbox"/>	999999116	DemoRiver Yusuf Bell
<input type="checkbox"/>	999999005	DemoJorge Mark Ross
<input type="checkbox"/>	999999013	DemoMack Wade Smith

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**Step 3d: Click Replace User.**



The screenshot shows a light blue panel with a dark blue header. Below the header are two buttons. The first button is labeled "Remove" and is followed by the text "- Remove user from the selected student's IEP access list." The second button is labeled "Replace User" and is followed by the text "- Update selected student's IEP access list with new user." The "Replace User" button is circled in red.

<a href="#">Remove</a>	- Remove user from the selected student's IEP access list.
<a href="#">Replace User</a>	- Update selected student's IEP access list with new user.

## IEP Form Contacts

IEP Form Contacts can be setup from the [Landing Page](#). This creates a default list of staff that need to be designated as the contact and signator for *Notice and Consent* documents.

**Step 1:** From the drop-down menu on the Landing Page, click **IEP** and select **IEP Form Contacts**.



**Step 2:** Click **Add**.



**Step 3:** **Search** for the staff member that should be a contact, signator, or both on forms.

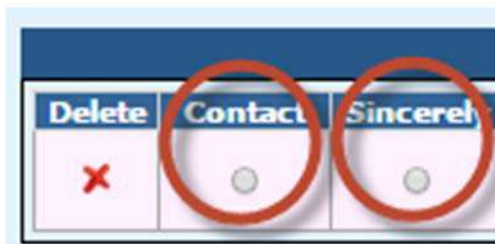




**Step 4:** Click the check-mark next to the desired staff.

Select	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input checked="" type="checkbox"/>	9000029	DemoRoxana J Adams	Female	White	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000161	Train11Chelsey L Bailey	Female	Black or African American	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000028	DemoAngie D Baker	Female	White, Non-Hispanic	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000003	DemoLina A Bell	Female	Unknown	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000034	DemoMarisa Bell	Female	Hispanic or Latino	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000024	DemoReina Brooks	Female	White, Non-Hispanic	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000019	DemoAsia D Brown	Female	White	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000165	Train15Jess Brown	Female	Hispanic or Latino	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000013	DemoGabriel E Clark	Male	White	Wabash & Ohio Valley Sp Ed Dist		
<input checked="" type="checkbox"/>	9000042	DemoOakes Clark	Male	White	Wabash & Ohio Valley Sp Ed Dist		

**Step 5:** Select **Contact**, **Sincerely**, or both for the added staff member.



**Step 6:** To modify Personnel *Title(s)*, click **Modify**.

Your Default Contact List (+ Add)						
Delete	Contact	Sincerely	Personnel	Title(s)	Type	Phone(s)
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	DemoPaloma Allen	Title (Modify)	No Records Found	Number (Modify)

[Return](#) →

**Step 7:** Click **Add**.

**Personnel Titles** Step 1 of 1

When are you finished setting up the titles click Return.

Title(s) for **DemoPaloma F Allen**

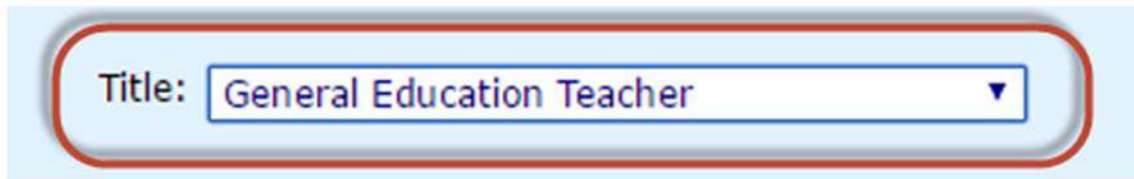
**Titles (+ Add)**

Title

No Records Found

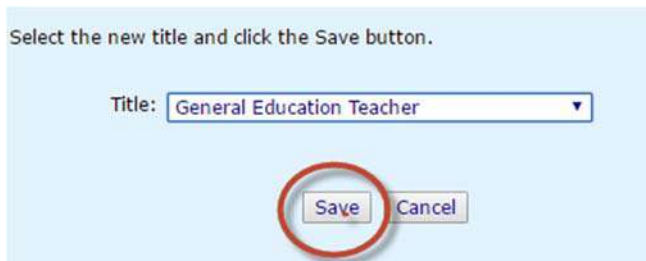
[Return](#) →

**Step 8:** Select *Title* role of the selected personnel.



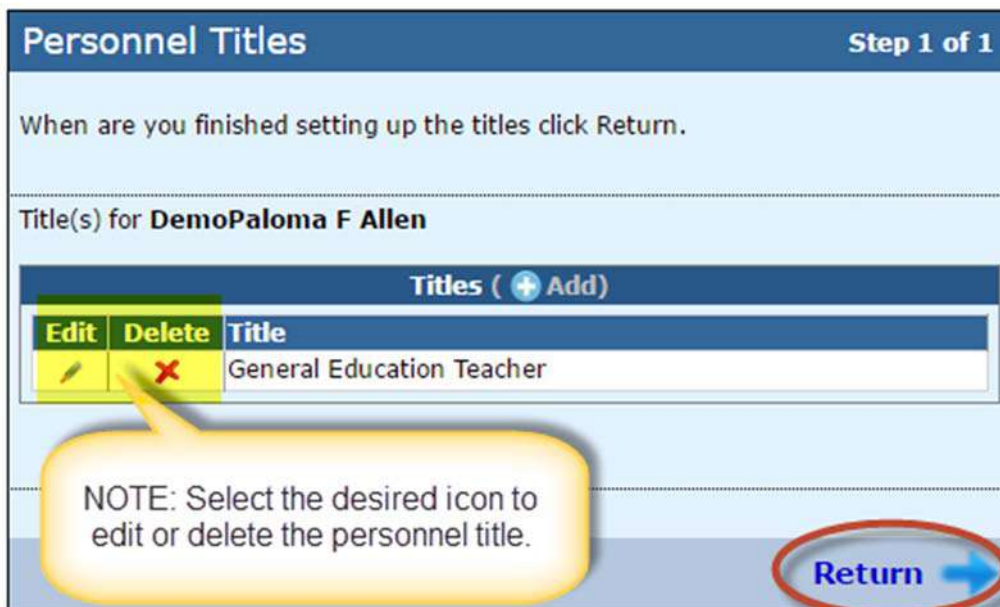
A screenshot of a web interface showing a dropdown menu. The text "Title:" is followed by a dropdown box containing the text "General Education Teacher" and a downward-pointing arrow. The entire dropdown box is highlighted with a red rounded rectangle.

**Step 9:** Click **Save**.



A screenshot of a web interface showing a dropdown menu with "General Education Teacher" selected. Below the dropdown are two buttons: "Save" and "Cancel". The "Save" button is circled in red.

**Step 10:** Click **Return**.



A screenshot of a web interface titled "Personnel Titles" with "Step 1 of 1" in the top right corner. The main heading is "Personnel Titles". Below it is the instruction "When are you finished setting up the titles click Return." followed by "Title(s) for DemoPaloma F Allen". A table titled "Titles (+ Add)" contains one row with the title "General Education Teacher". The table has columns for "Edit" (with a pencil icon) and "Delete" (with a red X icon). A yellow callout box points to the "Delete" icon with the text "NOTE: Select the desired icon to edit or delete the personnel title." In the bottom right corner, there is a blue "Return" button with a right-pointing arrow, which is circled in red.

Titles (+ Add)		
Edit	Delete	Title
		General Education Teacher

**Step 11:** To add *Phone(s)*, click **Modify**.

Your Default Contact List (+ Add)					
Delete	Contact	Sincerely	Personnel	Title(s)	Phone(s)
			DemoPaloma Allen	Title (Modify) General Education Teacher	Type No Records Found Number (Modify)

[Return](#)

**Step 12:** Click **Add**.

**Phone Numbers** Step 1

You may add, edit and delete multiple phone numbers using this wizard.

Phone numbers for **DemoPaloma F Allen**

Phone Numbers (+ Add)	
Type	Number
No Records Found	

[Cancel](#) [Return](#)

**Step 13:** Enter the *phone type, number, and extension* if available.

Phone Type:

Phone Number:

Extension:

**Step 14:** When complete, click **Save**.



**Step 15:** Click **Return**.

**Phone Numbers** Step 1

You may add, edit and delete multiple phone numbers using this wizard.

---

Phone numbers for **DemoPaloma F Allen**

**Phone Numbers** ( + Add)

Edit	Delete	Type	Number
		Work Phone	(618) 272-7470 Ext. 123

---

Cancel **Return**

**Step 16:** Repeat steps 2-13 to add any additional staff members to the default list for use during IEP creation.

**Your Default Contact List** ( + Add)

Delete	Contact	Sincerely	Personnel	Title(s)	Phone(s)	
	<input type="radio"/>	<input type="radio"/>	DemoPaloma Allen	<b>Title</b> (Modify) General Education Teacher	<b>Type</b>	<b>Number</b> (Modify) Work (618) 272-7470 Ext. 123

**NOTE:** To delete personnel(s) from your Default Contact List, select the "red X" icon

**Return**

**Step 17:** To exit the wizard, click **Return**.

**Your Default Contact List** ( + Add)

Delete	Contact	Sincerely	Personnel	Title(s)	Phone(s)	
	<input type="radio"/>	<input type="radio"/>	DemoPaloma Allen	<b>Title</b> (Modify) General Education Teacher	<b>Type</b>	<b>Number</b> (Modify) Work (618) 272-7470 Ext. 123

**Return**

## Adding IEP Common Users

Common users is a default list that can be created for all IEP users to utilize. This default list can be used for quicker case load and IEP creation.

**Step 1:** From the drop-down menu on the Landing Page, click **IEP** and select **IEP Common Users**.



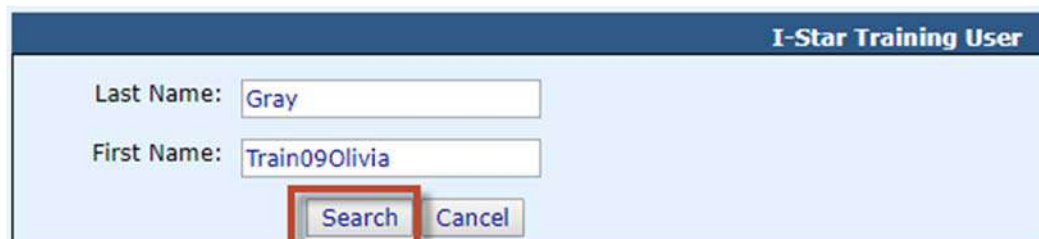
**Step 2:** Click **Add** next to *Common Users*.



**Step 3:** Enter the *First Name* and *Last Name* of the user.

A screenshot of a search form titled 'I-Star Training User'. It contains two input fields: 'Last Name:' and 'First Name:'. Below the input fields are two buttons: 'Search' and 'Cancel'. The 'Last Name' and 'First Name' input fields are highlighted with a red box.

**Step 4:** Click **Search**.

A screenshot of the 'I-Star Training User' search form. The 'Last Name' field contains the text 'Gray' and the 'First Name' field contains the text 'Train09Olivia'. Below the input fields are two buttons: 'Search' and 'Cancel'. The 'Search' button is highlighted with a red box.

**Step 5:** Select the check-mark to add users to the common users list.

User Search				
Select	Name	District	Email Address	IWAS User Id
<input checked="" type="checkbox"/>	Train09Olivia Gray	Harrisburg CUSD 3	jpeck@isbe.net	Train09IStar

**Step 6:** Click the desired boxes you would like the user to have.

User: **Train09Olivia Gray**

Interpreter:

Read-Only Flag:

Receive Notifications:

Make Forms Official:

Will Attend Meetings:

IEP Case Manager:

NOTE: You must select least one IEP Case Manager to make an IEP official.

**Step 7:** Click **Add**.

User: **Train09Olivia Gray**

Interpreter:

Read-Only Flag:

Receive Notifications:

Make Forms Official:

Will Attend Meetings:

IEP Case Manager:

**Step 8:** You will then see that user in your *Common Users* grid.

Common Users (+ Add)								
Edit	Delete	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
		Gray, Train09Olivia	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 9:** Repeat steps 2-5 to add additional *Common Users* to the grid.

**Step 10:** Click **Return** to go back to your home screen.



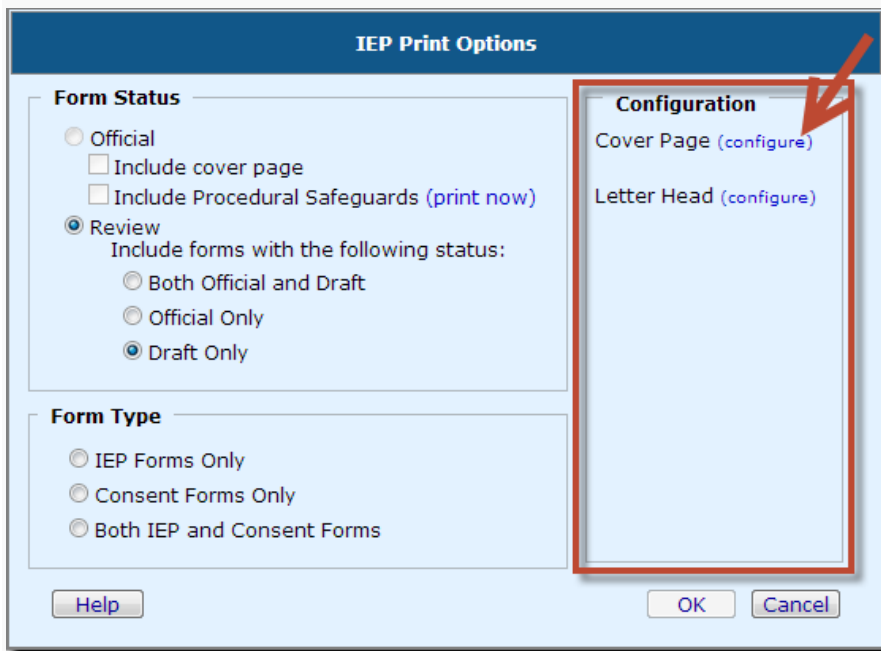
## Configuring a Cover Page

NOTE: There are two ways to configure a coversheet. See these two options in step 1a and step 1b below:

**Step 1a:** From the drop-down menu on the Landing Page, click on **IEP** and **IEP Coversheets**, and follow steps 2-5.

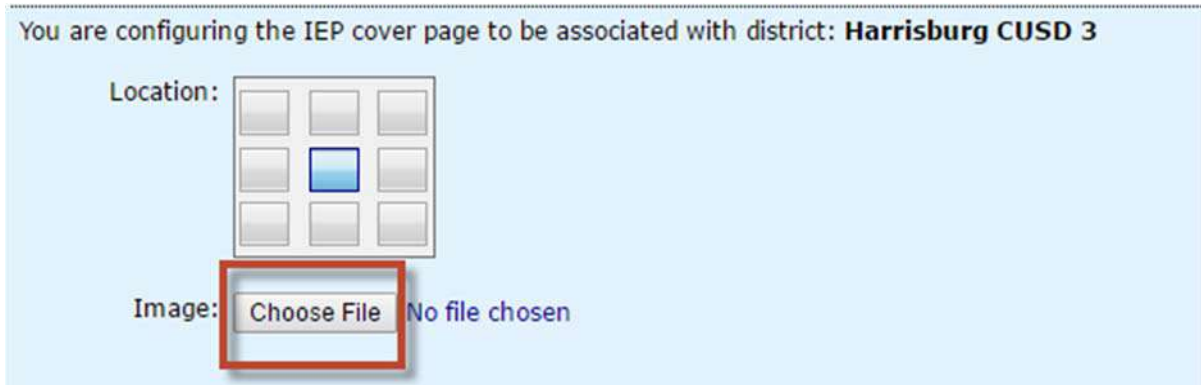


**Step 1b:** From the *IEP Print Options*, click **configure**, and follow steps 2-5c.

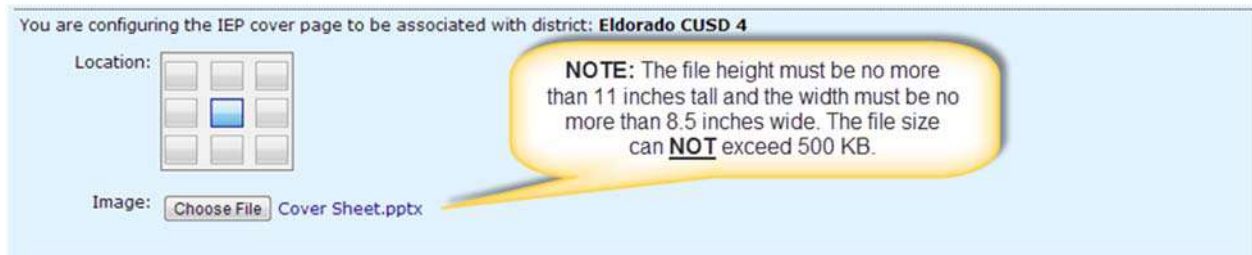
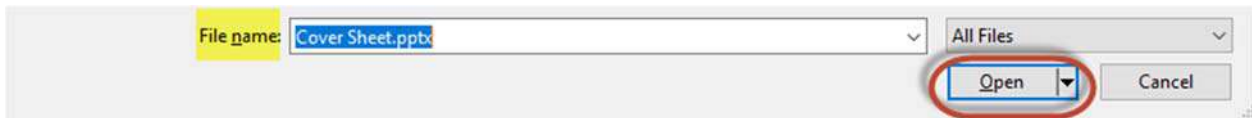
A screenshot of a dialog box titled 'IEP Print Options'. The dialog has a blue header bar. It is divided into three main sections: 'Form Status', 'Form Type', and 'Configuration'. The 'Form Status' section has two radio buttons: 'Official' and 'Review'. Under 'Review', there are three radio buttons: 'Both Official and Draft', 'Official Only', and 'Draft Only'. The 'Form Type' section has three radio buttons: 'IEP Forms Only', 'Consent Forms Only', and 'Both IEP and Consent Forms'. The 'Configuration' section is highlighted with a red box and contains two items: 'Cover Page (configure)' and 'Letter Head (configure)'. A red arrow points to the 'configure' link next to 'Cover Page'. At the bottom of the dialog, there are three buttons: 'Help', 'OK', and 'Cancel'.



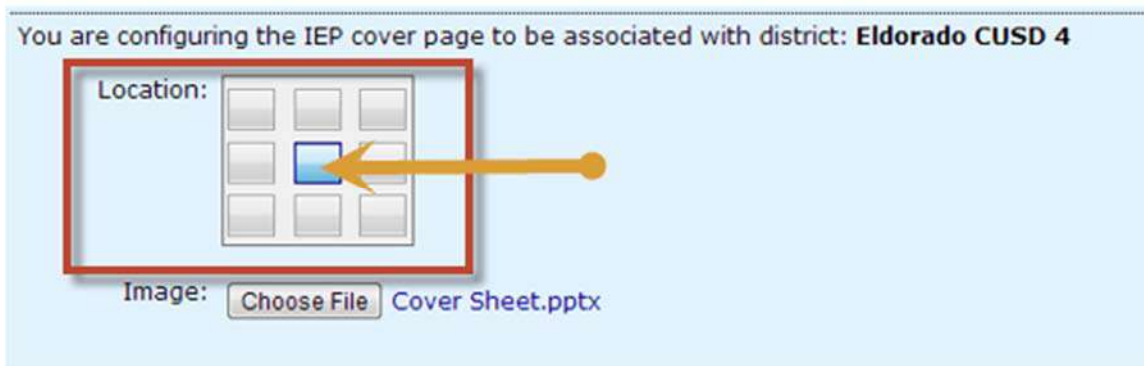
**Step 2:** From here, you can choose an image and upload it to appear on the cover page. Click **Choose File**.



**Step 3:** Browse to the location where your image is located. Select the image and click **Open**.



**Step 4:** Choose the location on the page where you would like this image to appear.

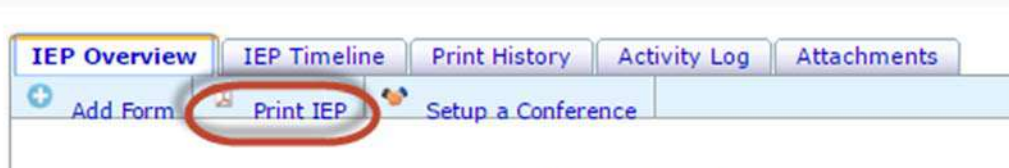


**Step 5:** When complete, click **Save**.

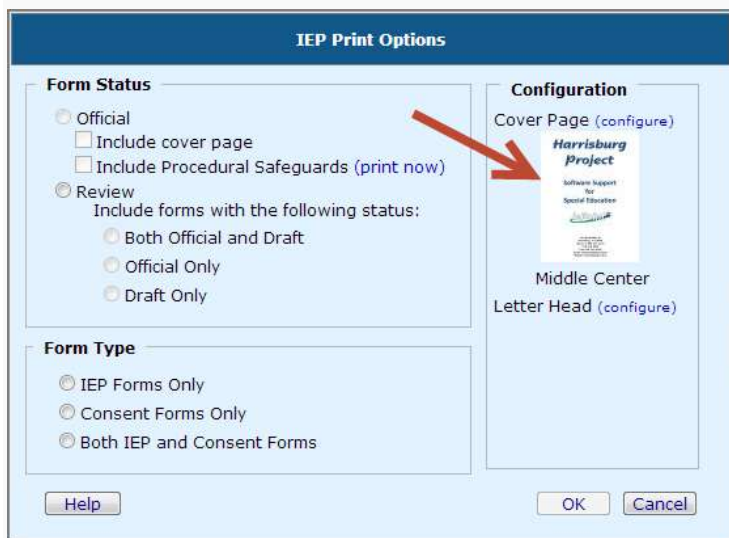


NOTE: If you are working in the *IEP Print Options*, continue by following steps 5a-5c.

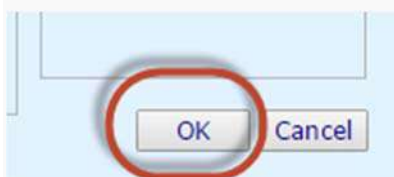
**Step 5a:** I-Star will return to the **IEP Overview** page. To view your cover page, click **Print IEP**.



**Step 5b:** You should then see the image that you uploaded.



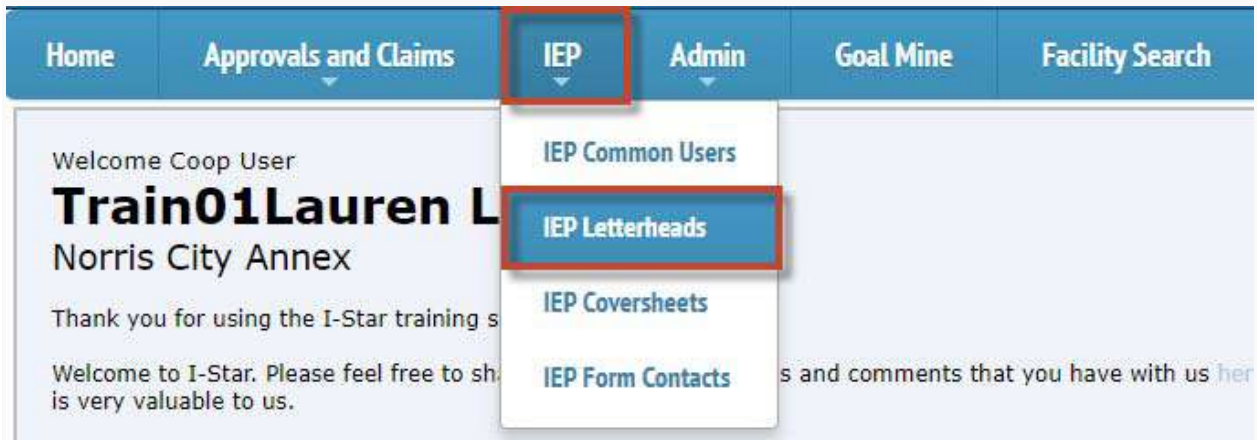
**Step 5c:** When complete, click **OK**.



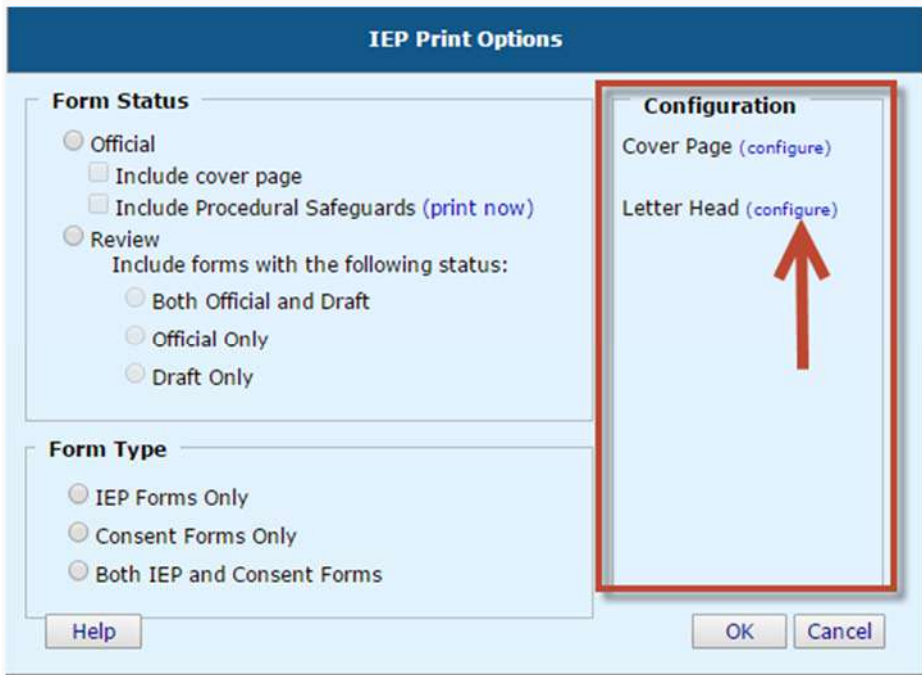
## Configuring Letter Head

NOTE: There are two ways to configure a letterhead. See these two options in step 1a and step 1b below:

**Step 1a:** From the drop-down menu on the Landing Page, click on **IEP** and **IEP Letterheads** and follow steps 2-4.



**Step 1b:** From the *IEP Print Options*, click **configure** and follow steps 2-4c.



**Step 2:** Choose the image you would like to serve as your letter head by clicking **Choose File**.

**Configure Letter Head** Step 1 of 1

You may upload an image to be used as a letter head for your district. The letter head will be placed on notice and consent forms to be sent to the parent. The maximum dimensions are 8 inches by 2 inches.

You are saving the letter head to be on Consent Forms associated with district: **Harrisburg CUSD 3**

Image: **Choose File** No file chosen

Save - Please save the letter head.  
 Cancel - Please exit the wizard.

**Save** →

**Step 3:** Select image and click **Open**.

File name: Harrisburg Project 1.gif

All Files

**Open** Cancel

**Step 4:** Once you've chosen your letter head, click **Save**.

Save - Please save the letter head.  
 Cancel - Please exit the wizard.

**Save** →

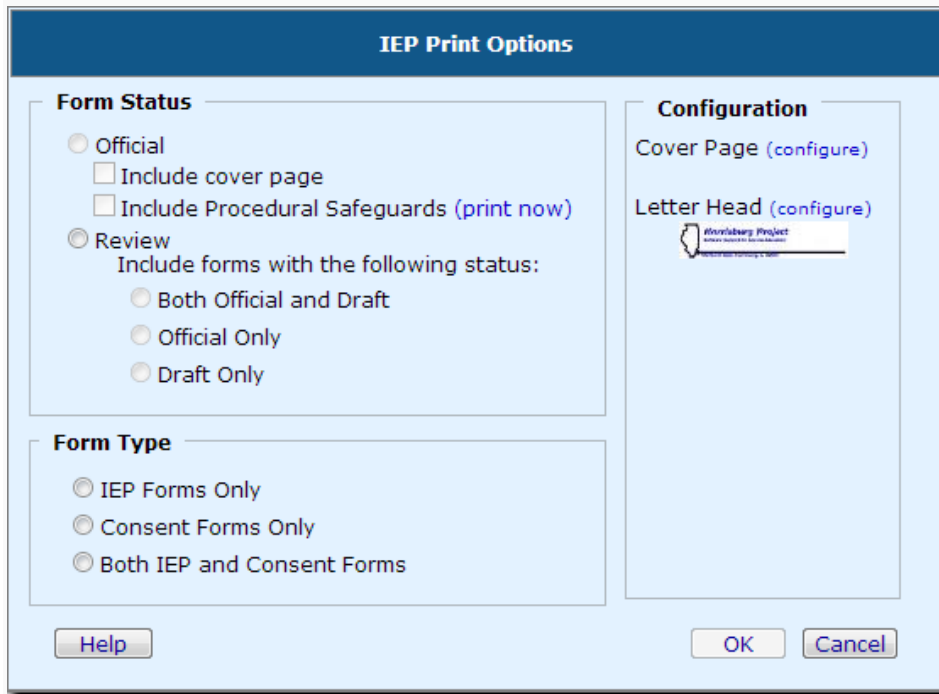
NOTE: If you are working in the *IEP Print Options*, continue by following steps 4a-4c.

**Step 4a:** I-Star will return to the *IEP Overview* page. To view your cover page, click **Print IEP**.

**IEP Overview** IEP Timeline Print History Activity Log Attachments

+ Add Form **Print IEP** Setup a Conference

**Step 4b:** You should then see the image that you uploaded.

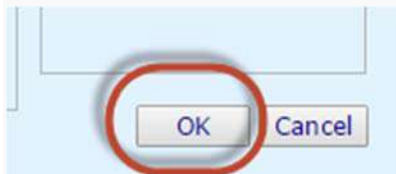


The image shows a dialog box titled "IEP Print Options" with a blue header. It is divided into three main sections: "Form Status", "Form Type", and "Configuration".

- Form Status:** Contains radio buttons for "Official" and "Review". Under "Official", there are checkboxes for "Include cover page" and "Include Procedural Safeguards (print now)". Under "Review", there is a sub-section "Include forms with the following status:" with radio buttons for "Both Official and Draft", "Official Only", and "Draft Only".
- Form Type:** Contains radio buttons for "IEP Forms Only", "Consent Forms Only", and "Both IEP and Consent Forms".
- Configuration:** Contains links for "Cover Page (configure)" and "Letter Head (configure)". Below "Letter Head (configure)", there is a small image of a document header with the text "Stouffville Project" and "www.stouffville.ca".

At the bottom of the dialog box, there are three buttons: "Help", "OK", and "Cancel".

**Step 4c:** When complete, click **OK**.



## Adding Users to the Access List

**Step 1:** From the **Student Profile**, click **Current/Create IEP**.



The screenshot shows a web interface for a student profile. At the top, there are four tabs: 'Profile', 'Current/Create IEP', 'Archived IEPs', and 'Activity Log'. The 'Current/Create IEP' tab is highlighted with a red box. Below the tabs, the student's name 'DemoMckenzie Magda Watson' and 'SIS ID: 999999081' are displayed. Underneath, there are several sub-tabs: 'IEP Overview', 'IEP Timeline', 'Print History', 'Activity Log', and 'Attachments'. Below these are action buttons: 'Add Form', 'Print IEP', 'Setup a Conference', and 'Delete/Hide IEP Package'. The main content area shows the following information:

- IEP: (Select Others)
- Year: 2018
- IEP Status: Draft
- Resident District: Harrisburg CUSD 3

**Step 2:** You will be required to enter a *Purpose of Visit* and click **Save**.



The screenshot shows a dialog box titled 'Purpose for IEP Activity'. The text inside reads: 'You must enter a reason why you are visiting the IEP at this time.' Below this text, there is a 'Purpose of Visit:' label followed by a dropdown menu. A red arrow points to the dropdown menu. Below the dropdown menu is a 'Notes:' label followed by a large text area. At the bottom of the dialog box, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red.

**Step 3:** You will be directed to the **IEP Overview** tab of the student's IEP.

Profile | Current/Create IEP | **Archived IEPs** | Activity Log

Student: **DemoMckenzie Magda Watson** SIS ID: **999999081**

**IEP Overview** | IEP Timeline | Print History | Activity Log | Attachments

Add Form | Print IEP | Setup a Conference | Delete/Hide IEP Package

IEP: (Select Others)  
 Year: **2018**  
 IEP Status: **Draft**  
 Resident District: **Harrisburg CUSD 3**

**Step 4:** From here, click **Modify** in the *Access List* box.

Access List: Access List (Modify)

Name	Entity	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	IEP Case Manager
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Step 5:** Select the check-mark beside the common user you would like to add to the *Access List*.

(Add me!)

Access List (Add)

Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
No Records Found									

You can select a user from the list of common user for your district.

Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
<input checked="" type="checkbox"/>	Gray, Train09Olivia	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 6:** Click the desired boxes you would like the user to have.

User: **Train09Olivia Gray**

Interpreter:

Read-Only Flag:

Receive Notifications:

Make Forms Official:

Will Attend Meetings:

IEP Case Manager:

**NOTE: You must select least one IEP Case Manager to make an IEP official.**

**Step 7:** Click **Add**.

User: **Train09Olivia Gray**

Interpreter:

Read-Only Flag:

Receive Notifications:

Make Forms Official:

Will Attend Meetings:

IEP Case Manager:



**Step 8:** The *Common User* will be moved to the *Access List*.

The screenshot shows the 'Access List' interface. At the top, there is a table with columns: Edit, Delete, Name, Entity, Interpreter, Read-Only, Notifications, Make Forms Official, Will Attend Meetings, and Iep Case Manager. A row is present with the name 'Train09Olivia Gray' and entity 'Harrisburg CUSD 3'. Below this table, a message says 'You can select a user from the list of common user for your district.' Underneath is the 'Common Users' table, which currently shows 'No Records Found'. A red arrow points from the 'Name' column of the 'Common Users' table up to the 'Name' column of the 'Access List' table, indicating the transfer of a user.

**Step 9:** If you have IEP Administrative access, you will have the option to click **(Add Me!)** to add yourself to the *Access List*.

NOTE: If you have been setup as a basic user, you will need to contact the district administrator or the IEP administrator to set up your case load.

The screenshot shows the 'Access List' interface. A button labeled '(Add me!)' is highlighted with a red box in the top left corner. Below it, the 'Access List' table is empty, showing 'No Records Found'. The 'Common Users' table below it contains one record: 'Gray, Train09Olivia' with various permission checkboxes.

**Step 10:** Click **Add** in the *Access List* box to add a user that is not listed in the *Common Users* pool.

The screenshot shows the 'Access List' interface. The 'Add' button (a plus sign in a circle) next to the 'Access List' title is highlighted with a red box. The 'Access List' table now contains the user 'Train09Olivia Gray' from 'Harrisburg CUSD 3'. The 'Common Users' table below it is empty, showing 'No Records Found'.

**Step 11:** Enter *First Name* and *Last Name*.

I-Star Training User

Last Name:

First Name:

**Step 12:** Click **Search**.

I-Star Training User

Last Name:

First Name:

**Step 13:** Select the check-mark to add them to the *Access List*.

User Search				
Select	Name	District	Email Address	IWAS User Id
<input checked="" type="checkbox"/>	Train15Jess Brown	Norris City Annex	jpeck@isbe.net	Train15istar

**Step 14:** Check the desired roles you would like the user to have.

You are adding Train15Jess Brown to the access list for this IEP. Configure the appropriate settings based on the level of access you want to give to Train15Jess Brown.

User: **Train15Jess Brown**

Interpreter:

Read-Only Flag:

Receive Notifications:

Make Forms Official:

Will Attend Meetings:

IEP Case Manager:

**Step 15:** Click **Add**.

You are adding Train15Jess Brown to the access list for this IEP. Configure the appropriate settings based on the level of access you want to give to Train15Jess Brown.

User: **Train15Jess Brown**

Interpreter:

Read-Only Flag:

Receive Notifications:

Make Forms Official:

Will Attend Meetings:

IEP Case Manager

**Add**

**Step 16:** Once all users have been added, click **Return**.

Access List (+ Add)

Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
		Train09Olivia Gray	Harrisburg CUSD 3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Train15Jess Brown		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

You can select a user from the list of common user for your district.

Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
No Records Found							

**Return**

NOTE: The user will also be granted access to the IEP case management module of this application by their security administrator.

## Student Profile

---

The student profile information is automatically imported from the Student Information System (SIS). The following information carries over from SIS to I-Star:

- Name
- SIS ID
- Natural Language
- Home Language
- Home School
- Serving School
- Gender
- Birthdate
- Ethnicity


**Transportation**  
 Use this to modify transportation for this student.

**Student Profile**

Name: **DemoMckenzie Magda Watson**  
 SIS Id: **999999081**  
 Natural Language: **Spanish**  
 Home Language: **Spanish**  
 Home School: **Harrisburg CUSD 3**  
 Serving School: **Harrisburg CUSD 3**  
 Grade: **6th**  
 Gender: **Female**  
 Birthdate: **4/7/2002**  
 Ethnicity: **Hispanic or Latino**

**Other Information** (Modify)

Medicaid #	Anticipated Grad Date	Eligibility Determination Date

**Notes** (0)

Update Date	Note Type	Note
No Records Found		

**Events** (1)

Type	Most Recent Date	Next Event Date
Case Study Consent		4/27/2018 12:00:00 AM

**Parents/Guardians** (Modify)

Name: **Kenzie Schmitt**  
 Type: **Parent**  
 Gender: **Female**  
 Birthdate:   
 Ethnicity:

**Languages** (Modify)

Language	Primary?
English	<input checked="" type="checkbox"/>

**Phone Numbers** (Modify)

Type	Number
Home	(618) 272-7470

**Addresses** (Modify)

Type	Address
Home	123 Sesame Street Harrisburg, IL 62946

# Other Information

**Step 1:** *Other Information* is located in the **Student Profile**.

**Student Profile**

Name: **DemoMckenzie Magda Watson**  
 SIS ID: **999999081**  
 Natural Language: **Spanish**  
 Home Language: **Spanish**  
 Home School: **Harrisburg CUSD 3**  
 Serving School: **Harrisburg CUSD 3**  
 Grade: **6th**  
 Gender: **Female**  
 Birthdate: **4/7/2002**  
 Ethnicity: **Hispanic or Latino**

**Other Information (X Modify)**

Medicaid #	Anticipated Grad Date	Eligibility Determination Date

**Parents/Guardians (X Modify)**

Name: **Kenzie Schmitt**  
 Type: **Parent**  
 Gender: **Female**  
 Birthdate:  
 Ethnicity:

**Languages (X Modify)**

Language	Primary?
English	<input checked="" type="checkbox"/>

**Phone Numbers (X Modify)**

Type	Number
Home	(618) 272-7470

**Addresses (X Modify)**

Type	Address
Home	123 Sesame Street Harrisburg, IL 62946

**Step 2:** To enter *Medicaid Number, Anticipated Grad Date, and/or Eligibility Determination Date*, click **Modify**.

**Other Information (X Modify)**

Medicaid #	Anticipated Grad Date	Eligibility Determination Date

**Step 3:** Enter the student's *Medicaid Number*, *Anticipated Graduation Date*, and *Eligibility Determination Date*, if known.

Edit the information and click the Save button.

Medicaid #:

Anticipated Grad Date:  MM/DD/YYYY

Eligibility Determination Date:  MM/DD/YYYY

Save - Please Save the Other Information

Cancel - Please exit the wizard.

**Step 4:** When complete, click **Save**.

Save - Please Save the Other Information

Cancel - Please exit the wizard.

# Notes

---

**Step 1: Notes** are located in the **Student Profile**.

**Student Profile**  
Name: **DemoMckenzie Magda Watson**  
SIS Id: **999999081**  
Natural Language: **Spanish**  
Home Language: **Spanish**  
Home School: **Harrisburg CUSD 3**  
Serving School: **Harrisburg CUSD 3**  
Gender: **Female**  
Birthdate: **4/7/2002**  
Ethnicity: **Hispanic or Latino**

**Other Information** (  **Modify** )

Medicaid #	Anticipated Grad Date	Eligibility Determination Date

 **Notes (0)**

Update Date	Note Type	Note
No Records Found		

 **Events (0)**

Type	Most Recent Date	Next Event Date
No Records Found		

**Step 2:** To edit/add notes, click **Notes**.

 **Notes (0)**

Update Date	Note Type	Note
No Records Found		

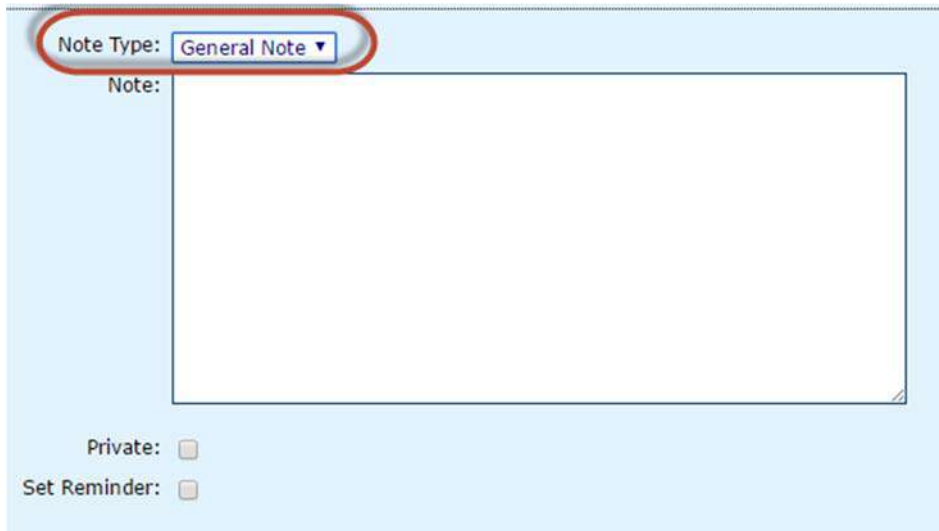


**Step 3: Click Add.**



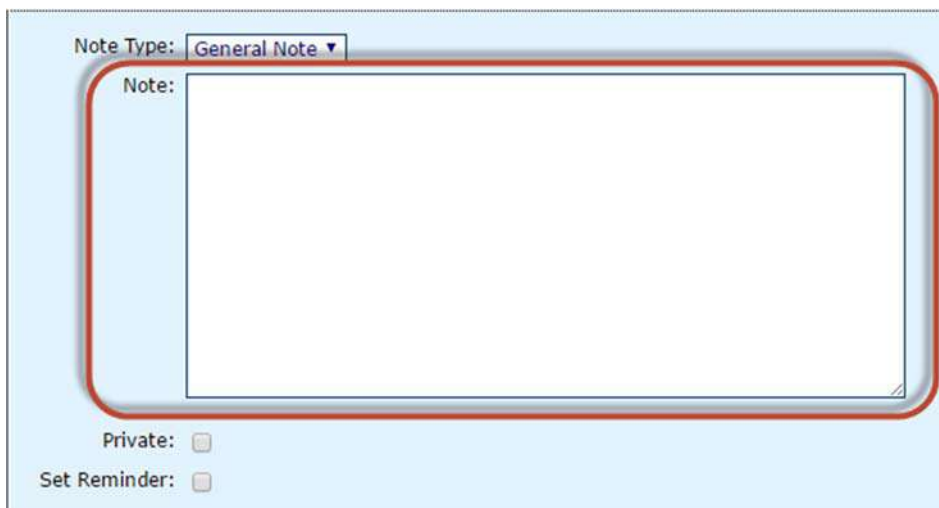
The screenshot shows a web interface for a student profile. At the top, there are navigation tabs: Profile, Current/Create IEP, Archived IEPs, and Activity Log. Below these, the student's name is 'DemoMckenzie Magda Watson', with 'SIS ID: 999999081' and 'DOB: 4/7/2002 (15 yrs 0 mo)' to the right. A message says 'You are currently viewing Notes for: (0) Student - DemoMckenzie Magda Watson' with a 'Return to Profile' link. Below this is a 'Notes' section with a table header containing 'View', 'Actions', 'Note Type', 'Note', and 'Private?'. The table body contains the text 'No Records Found'. A red circle highlights the 'Add' button in the 'Notes' header.

**Step 4: Select Note Type.**



The screenshot shows the 'Add Note' form. At the top, there is a 'Note Type:' dropdown menu with 'General Note' selected, which is circled in red. Below this is a large text area labeled 'Note:'. At the bottom of the form, there are two checkboxes: 'Private:' and 'Set Reminder:'. The form has a light blue background.

**Step 5: Enter the description of the Note.**



The screenshot shows the 'Add Note' form. The 'Note Type:' dropdown menu is set to 'General Note'. The 'Note:' text area is circled in red, indicating where the user should enter the description of the note. The 'Private:' and 'Set Reminder:' checkboxes are visible at the bottom of the form.

**Step 6:** To set as *Private* or *Set Reminder*, check the box.



Private:

Set Reminder:

**Step 7:** When complete, click **Save**.



Continue - Please continue the wizard.

Cancel - Please exit the wizard.

Cancel Save →


# Events

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**Step 1: Events** are located in the **Student Profile**.

**Student Profile**


Name: **DemoMckenzie Magda Watson**  
SIS Id: **999999081**  
Natural Language: **Spanish**  
Home Language: **Spanish**  
Home School: **Harrisburg CUSD 3**  
Serving School: **Harrisburg CUSD 3**  
Gender: **Female**  
Birthdate: **4/7/2002**  
Ethnicity: **Hispanic or Latino**

**Other Information** (  [Modify](#) )

Medicaid #	Anticipated Grad Date	Eligibility Determination Date

 **Notes (0)**

Update Date	Note Type	Note
No Records Found		

 **Events (0)**

Type	Most Recent Date	Next Event Date
No Records Found		

**Step 2:** To edit or add events, click **Events**.

 **Events (0)**

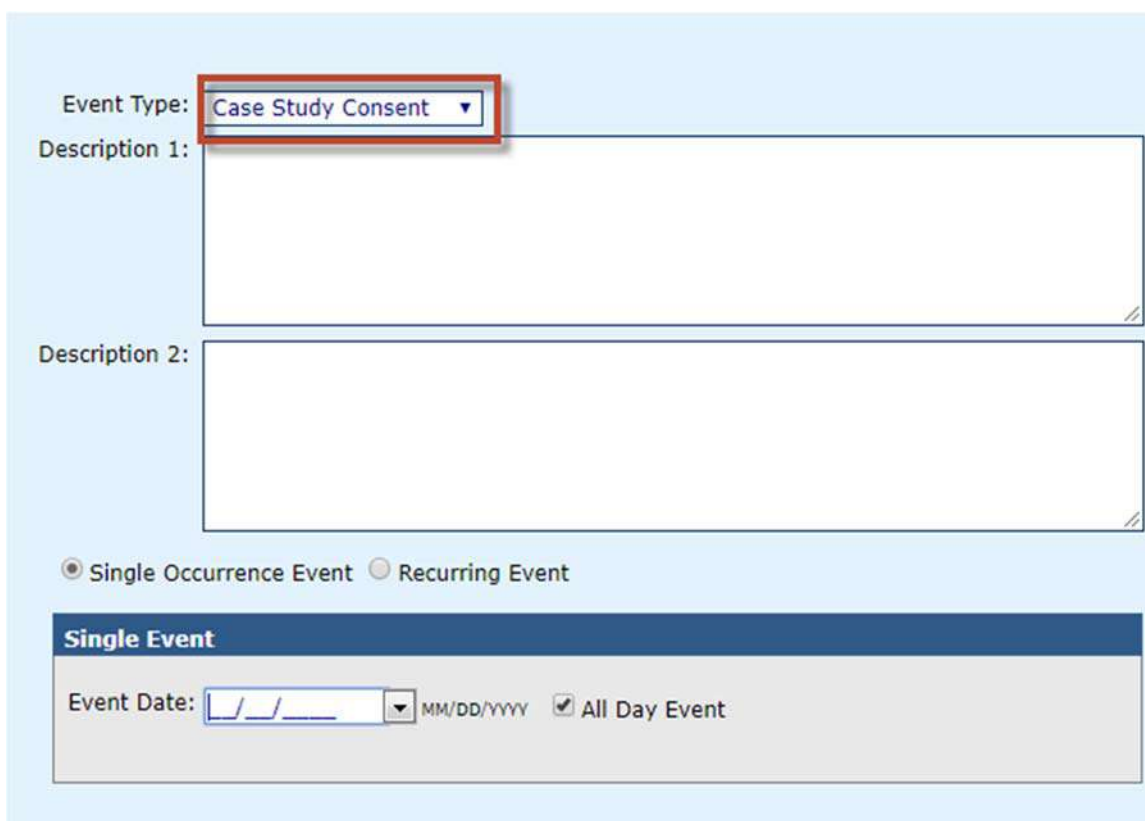
Type	Most Recent Date	Next Event Date
No Records Found		

**Step 3:** Click **Add**.



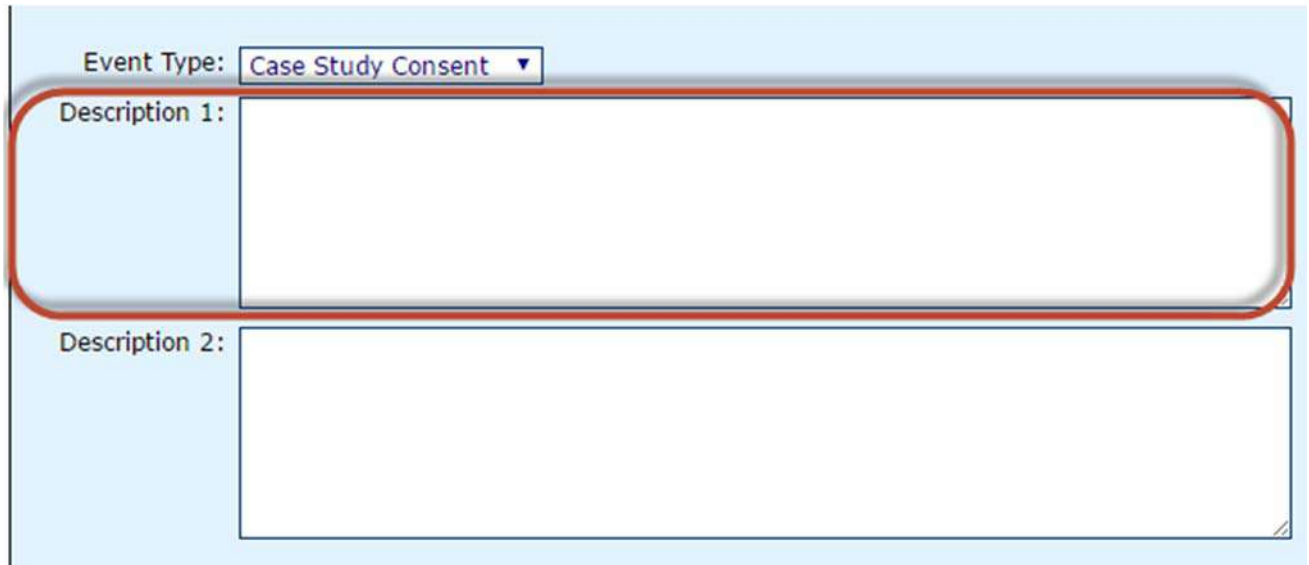
The screenshot shows a navigation bar with tabs: Profile, Current/Create IEP, Archived IEPs, and Activity Log. Below the navigation bar, the student's name is "DemoMckenzie Magda Watson", SIS ID is "999999081", and DOB is "4/7/2002 (15 yrs 0 mo)". A dropdown menu shows "(0) Student - DemoMckenzie Magda Watson" with a "Return to Profile" link below it. The "Events" section has a table with columns: Actions, Type, Description, Most Recent Date, and Next Event Date. The table contains "No Records Found". A red circle highlights the "Add" button in the top right corner of the Events section.

**Step 4:** Select the *Event Type* from drop-down.



The screenshot shows the event creation form. The "Event Type" dropdown menu is highlighted with a red box and contains the text "Case Study Consent". Below it are two text input fields labeled "Description 1:" and "Description 2:". At the bottom, there are radio buttons for "Single Occurrence Event" (selected) and "Recurring Event". A section titled "Single Event" contains an "Event Date" field with a dropdown arrow, followed by "MM/DD/YYYY" and a checked checkbox for "All Day Event".

**Step 5:** Enter *Description 1* of the event.

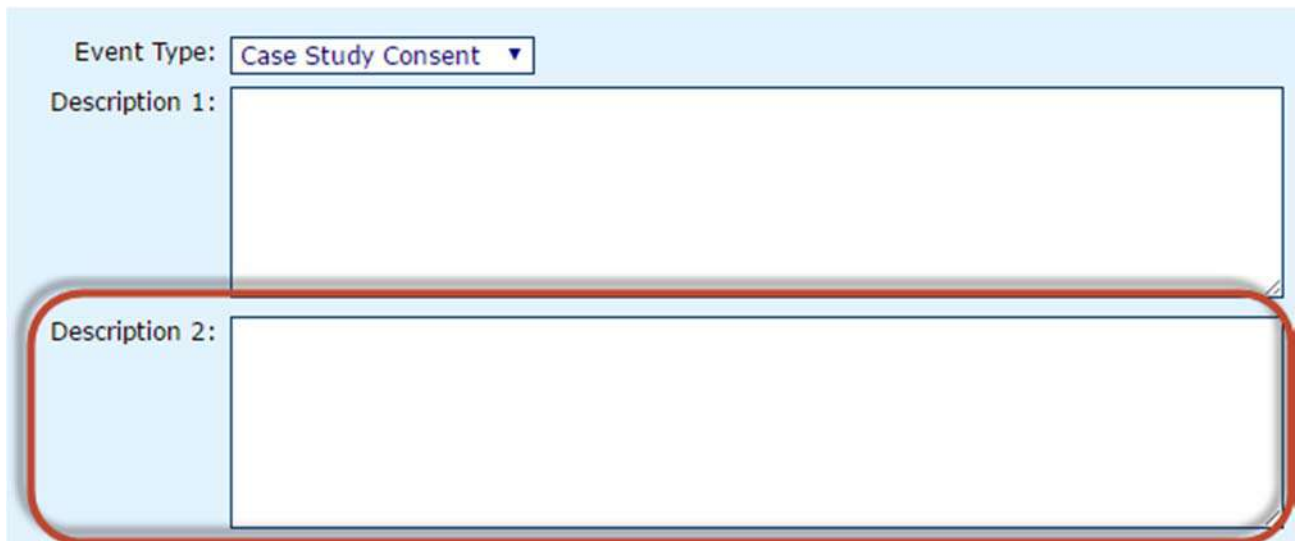


Event Type: Case Study Consent ▾

Description 1:

Description 2:

**Step 6:** If needed, enter *Description 2* of the event.



Event Type: Case Study Consent ▾

Description 1:

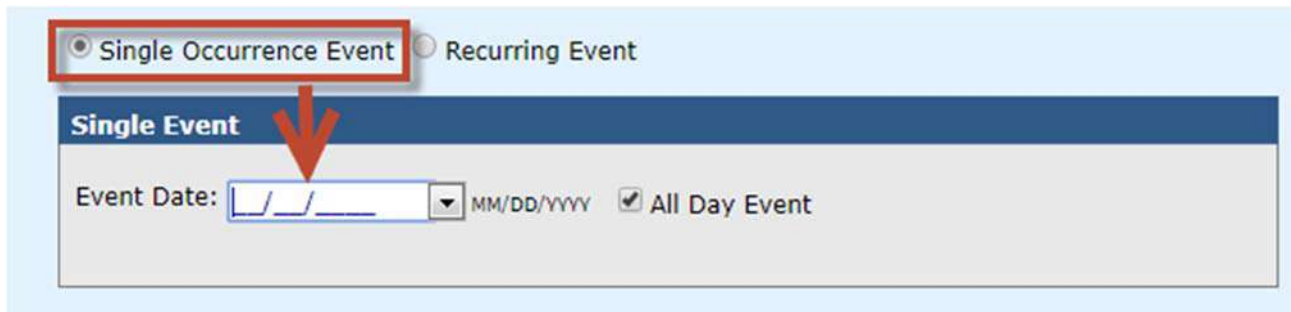
Description 2:

**Step 7:** Select *Single Occurrence Event* or *Recurring Event*.



Single Occurrence Event  Recurring Event

**Step 8:** If *Single Occurrence Event* is selected, enter the *Event Date*, and determine if this will be an *All Day Event* by checking the box.

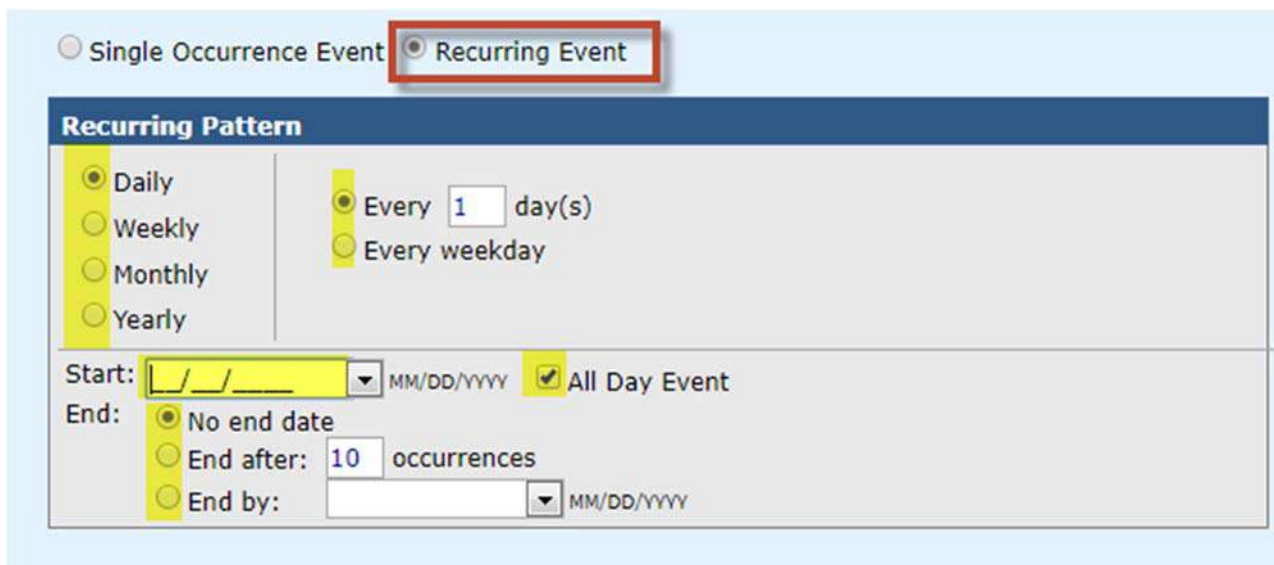


Single Occurrence Event  Recurring Event

**Single Event**

Event Date:  MM/DD/YYYY  All Day Event

**Step 9:** If *Recurring Event* is selected, determine the *Recurring Pattern* below.



Single Occurrence Event  Recurring Event

**Recurring Pattern**

Daily  Weekly  Monthly  Yearly

Every 1 day(s)  Every weekday

Start:  MM/DD/YYYY  All Day Event

End:  No end date  End after: 10 occurrences  End by:  MM/DD/YYYY

**Step 10:** Once complete, click **Continue**.



Continue - Please continue the wizard.  Cancel - Please exit the wizard.

**Step 11:** To return to the **Student Profile**, click **Return to Profile**.

The screenshot shows a software interface with a blue header bar. The header bar contains four tabs: 'Profile' (with a person icon), 'Current/Create IEP' (with a document icon), 'Archived IEPs' (with a document icon), and 'Activity Log' (with a document icon). Below the tabs, there is a grey bar with the text 'Student: DemoMckenzie Magda Watson', 'SIS ID: 999999081', and 'DOB: 4/7/2002 (15 yrs 0 mo)'. Below this, there is a dropdown menu with the text 'You are currently viewing Events for: (1) Student - DemoMckenzie Magda Watson'. Below the dropdown menu, there is a red circle around the text 'Return to Profile'. At the bottom of the header bar, there is a blue bar with the text 'Events ( + Add)'.

# Transportation

**Step 1:** Click the **Transportation** button to enter to the student's special transportation information.



## Transportation

Use this to modify transportation for this student.

**Step 2:** Click **Add** next to the section you where wish to add a new record.

### Student Transportation Step 1

Manage Student Transportation

---

School Year: 2018-2019

**Transportation Schedule** (+ Add)

Edit	Delete	Location	Transportation Type	Time	Driver	Phone #
No Records Found						


**Special Needs** (+ Add)

Edit	Delete	Special Needs
No Records Found		

**Billing History** (+ Add)

Edit	Delete	District To Bill	Start Date	End Date	Charge Rate
No Records Found					

Show Audit Trail

[Return](#) 



## Transportation Schedule

**Step 3:** Enter the appropriate information and click **Save**.

Enter the new transportation schedule information and click the Save button.

District Entity:

Transportation Type:  Drop-off  Pick-up

Location:

Time:

Driver:

Phone Number:

Notes:

**Step 4:** To edit a transportation schedule record, simply click the pencil icon. To delete, click the red **X**.

School Year:

Transportation Schedule (+ Add)

Edit	Delete	Location	Transportation Type	Time	Driver	Phone #
		Home	Pick-up	07:15 AM	Hornet	(800)-555-1212
		School	Drop-off	08:00 AM	Hornet	(800)-555-1212

## Special Needs

**Step 5:** Choose the special need from the drop-down and click **Save**.

NOTE: *Special Needs* in this drop-down are populated from the *Special Needs Definition* that required an initial set up. See **Special Needs** for instructions to add a *Special Needs Definition*.

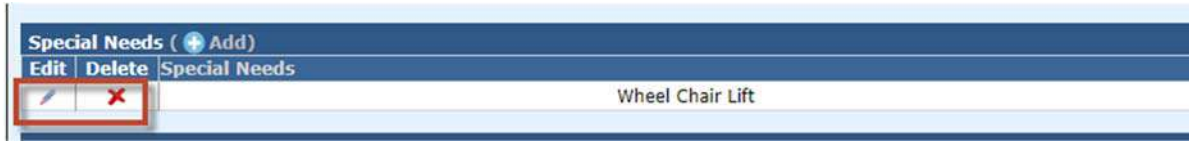
Upload Permissions LEA List Maintenance **Special Needs** Custom Events IEP Caseload Custom Notes Start New Year

Special Transportation Needs (+ Add)

Enter the new special need and click the Save button.

Special Need:

**Step 6:** To edit a special needs record, simply click the pencil icon. To delete, click the red **X**.



### **Billing History**

**Step 7:** Enter the appropriate information and click **Save**.

Enter the new transportation billing information and click the Save button.

Billing District Entity:

Start Date:  MM/DD/YYYY

End Date:  MM/DD/YYYY

Charge Rate:

Notes:

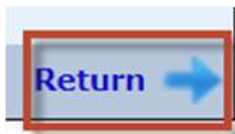
**Step 8:** To edit a billing history record, simply click the pencil icon. To delete, click the red **X**.



The screenshot shows a table with a blue header. The header text is "Billing History (+ Add)". Below the header, there are two columns: "Edit" and "Delete". The "Delete" column contains a red "X" icon. The table has one row with the text "Harrisburg CUSD 3". The "Edit" and "Delete" icons in the first row are highlighted with a red box.

Edit	Delete	District To Bill	Start Date	End Date	Charge Rate
		Harrisburg CUSD 3			

**Step 9:** Click **Return** to go back to the student's profile.



## Phone Numbers

---



Phone numbers associated with the student can be entered from the [Student's Profile](#) page.

**Step 1:** Click **Modify** in the *Phone Numbers* box.

Phone Numbers (✕ Modify)	
Type	Number
Home	(123) 456-7890

**Step 2:** Click **Add** to add a new phone number.

NOTE: You may add, edit, and delete multiple phone numbers using the wizard.

Phone Numbers (+ Add)			
Edit	Delete	Type	Number
		Home Phone	(123) 456-7890

**Step 3:** Enter the *Phone Type* and *Phone Number*. If known, provide the *Extension*.

Enter the new phone number and click the Save button.

Phone Type:	<input type="text" value="Home"/>		
Phone Number:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Extension:	<input type="text"/>		

**Step 4:** Click the **Save** button.

Enter the new phone number and click the Save button.

Phone Type:	<input type="text" value="Home"/>		
Phone Number:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Extension:	<input type="text"/>		

**Step 5:** If existing phone numbers are listed below that you would like to add, simply click the check-mark.

Existing Phone Numbers	
<input checked="" type="checkbox"/>	Phone Number (123) 456-7890 (Home)

**Step 6:** Click **Return** to get back to the **Student Profile** page.

You may add, edit and delete multiple phone numbers using this wizard.

Phone numbers for **Kenzie Schmitt**

Phone Numbers ( + Add)			
Edit	Delete	Type	Number
		Home Phone	(618) 272-7470

You may choose a phone number from the list below. These phone numbers are from the student's own profile and any other current guardians. Please note, when selecting a phone number below it will be a copy. This means any future changes to one of the phone numbers will not be reflected everywhere the phone number is used.

Existing Phone Numbers	
Select	Phone Number
No Records Found	

Cancel **Return**

## Addresses

---



Addresses associated with the student can be entered from the [Student's Profile](#) page.

**Step 1:** Click **Modify** in the *Addresses* box.

Addresses (✕ Modify)		
Type	Address	Invalid?
Home	16 S. Webster St Harrisburg, IL 62946	<input type="checkbox"/>

**Step 2:** Click **Add** to add a new address.

NOTE: You may add, edit, and delete multiple addresses using the wizard.

Addresses (+ Add)				
Edit	Delete	Type	Address	Invalid?
		Home Address	123 Happy St Harrisburg, IL 62946	<input type="checkbox"/>

**Step 3:** Enter the new address information.

Type:

Address:

City:

State:

Zip:  -

**Step 4:** Click the **Save** button.



A light blue form with the following fields: Type: Home (dropdown), Address: two stacked text boxes, City: one text box, State: Illinois (dropdown), Zip: two text boxes separated by a hyphen. At the bottom right, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red.

NOTE: You can also choose from the list of existing addresses. Simply click the check-mark to add the existing address for the student.



A table with a blue header 'Existing Addresses'. The table has two columns: 'Select' and 'Address'. The 'Select' column contains a radio button with a checkmark inside, which is circled in red. The 'Address' column contains the text '123 Happy St. Harrisburg, IL 62946 (Home Address)'.

**Step 5:** Click **Return** to get back to the **Student Profile** page.



A button with the text 'Return' and a blue arrow pointing to the right. The button is circled in red.

## Parents/Guardians

---

**Step 1:** Click **Modify** to edit the parents and guardians for a student.

**Parents/Guardians** (  **Modify** )

Name: **Kenzie Schmitt**  
Type: **Parent**  
Gender: **Female**  
Birthdate:  
Ethnicity:

**Languages** (  **Modify** )

Language	Primary?
English	<input checked="" type="checkbox"/>

**Phone Numbers** (  **Modify** )

Type	Number
Home	(618) 272-7470

**Addresses** (  **Modify** )

Type	Address
Home	123 Happy Lane Harrisburg, IL 62976

**Step 2:** Click **Add** to add a new parent/guardian.

**Current Parent/Guardian(s)** (  **Add** )

**Step 3:** To add a new parent/guardian, click **Add a New Parent/Guardian**.

**Create Parent/Guardian** Step 1 of 1

Search for or add a parent/guardian. At any time you may cancel the search by clicking the Return button and going back to the student's guardians page.

You are setting up a student's parent and/or guardian. You may tie the student to an existing parent/guardian if you are aware of a sibling for this student. If you do not know of a sibling you will need to create a new parent/guardian.

**Add a New Parent/Guardian**  
The Student is His/Her Own Guardian  
Search for a Sibling's Parent/Guardian

**NOTE:** This wizard allows you to add a new parent/guardian information, his/her own guardian, and/or search for a sibling's parent/guardian info

**Return**

NOTE: You can also add *The Student is His/Her Own Guardian* or *Search for a Sibling's Parent/Guardian*.

**Step 4:** Enter the required information and click **Continue**.

**Person Profile** Step 1 of 4

Please enter the required information and click Continue.

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Maiden Name:

Gender:

Birthdate:  MM/DD/YYYY

Ethnicity:

Email:

Interpreter Needed:

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.



**Step 5:** To add *Phone Number(s)*, click **Add**.

NOTE: Phone numbers can also be selected from existing phone numbers associated with this student. Click the check-mark to select an existing phone number.

### Person Profile Step 2 of 4

You may add, edit and delete multiple phone numbers using this wizard. When you are completed click the Continue button.

---

Phone numbers for **Kenzie Schmitt**

**Phone Numbers ( + Add)**

Type	Number
No Records Found	

You may choose a phone number from the list below. These phone numbers are from the student's own profile and any other current guardians. Please note, when selecting a phone number below it will be a copy. This means any future changes to one of the phone numbers will not be reflected everywhere the phone number is used.

**Existing Phone Numbers**

Select	Phone Number
No Records Found	

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

[< Previous](#)[Cancel](#)[Continue >](#)

**Step 6:** Enter the new phone number and click **Save**.

**Person Profile** Step 2 of 4

You may add, edit and delete multiple phone numbers using this wizard. When you are completed click the Continue button.

Phone numbers for **Kenzie Schmitt**

**Phone Numbers** (+ Add)

Type	Number
No Records Found	

Enter the new phone number and click the Save button.

Phone Type:

Phone Number:

Extension:

You may choose a phone number from the list below. These phone numbers are from the student's own profile and any other current guardians. Please note, when selecting a phone number below it will be a copy. This means any future changes to one of the phone numbers will not be reflected everywhere the phone number is used.

**Existing Phone Numbers**

Select	Phone Number
No Records Found	

**Step 7:** To add more phone numbers, repeat steps 5-6.

Phone numbers for **Kenzie Schmitt**

**Phone Numbers** (+ Add)

Edit	Delete	Type	Number
		Home	(618) 272-7470

**NOTE:** You can edit or delete the phone number by clicking the correct icon

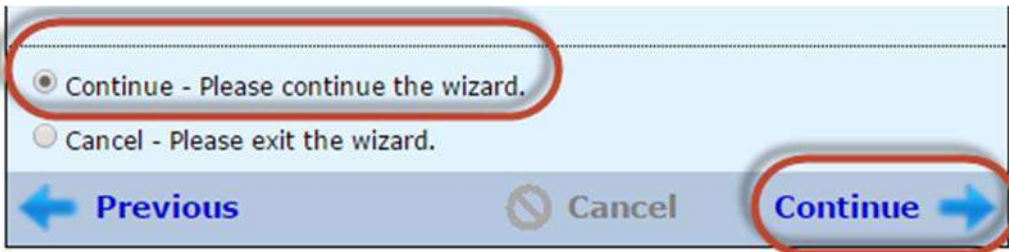
You may choose a phone number from the list below. These phone numbers are from the student's own profile and any other current guardians. Please note, when selecting a phone number below it will be a copy. This means any future changes to one of the phone numbers will not be reflected everywhere the phone number is used.

**Existing Phone Numbers**

Select	Phone Number
No Records Found	

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

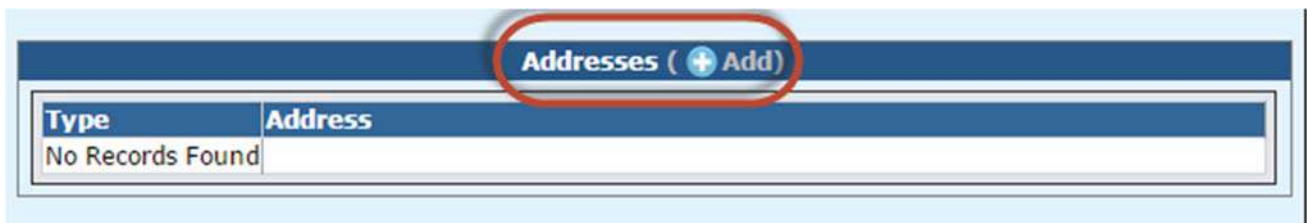
**Step 8:** When complete, click **Continue**.



A wizard navigation bar with a light blue background. It contains two radio buttons: the first is selected and labeled "Continue - Please continue the wizard.", and the second is unselected and labeled "Cancel - Please exit the wizard.". Below the radio buttons are three buttons: "Previous" with a left arrow, "Cancel" with a crossed-out circle, and "Continue" with a right arrow. The "Continue" button is circled in red.

**Step 9:** To add a new address, click **Add**.

NOTE: Addresses can also be selected from the list of existing addresses associated with this student. Click the check-mark to add the existing address.



A table titled "Addresses ( + Add)" with a dark blue header. The table has two columns: "Type" and "Address". The first row contains the text "No Records Found". The "+ Add" button is circled in red.

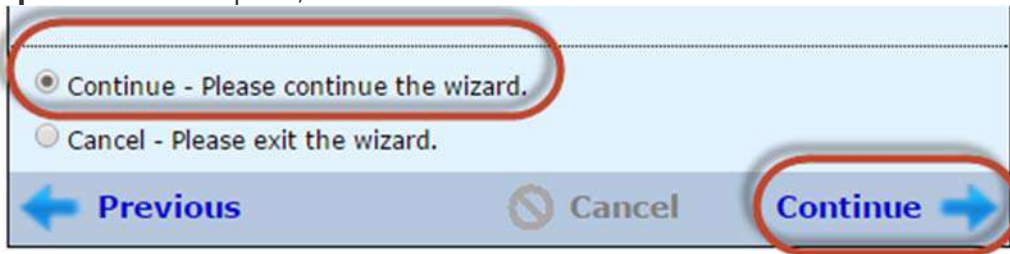
Type	Address
No Records Found	

**Step 10:** Enter the new address and click **Save**.



An address form with the following fields: "Type" (dropdown menu set to "Home"), "Address" (text input field containing "123 Happy Lane"), "City" (text input field containing "Harrisburg"), "State" (dropdown menu set to "Illinois"), "Zip" (text input field containing "62976"), and "Invalid?" (checkbox). At the bottom are "Save" and "Cancel" buttons. The "Save" button is circled in red.

**Step 11:** When complete, click **Continue**.



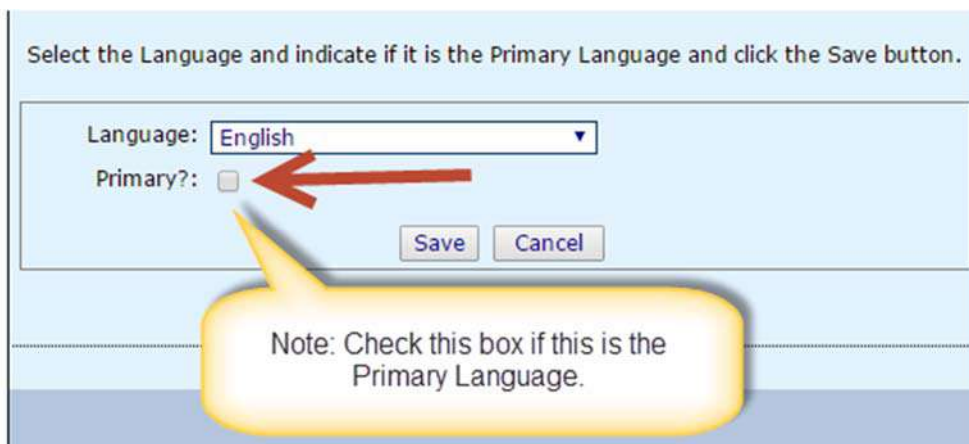
A wizard navigation screen with a light blue background. At the top, there are two radio button options: "Continue - Please continue the wizard." (selected) and "Cancel - Please exit the wizard." Below these are three buttons: "Previous" with a left arrow, "Cancel" with a crossed-out circle, and "Continue" with a right arrow. The "Continue" button is circled in red.

**Step 12:** To add *Languages*, click **Add**.



A "Person Profile" wizard screen, "Step 4 of 4". The header is dark blue with white text. Below the header, there is a light blue area with the text "You may add, edit and delete multiple languages for this person using this wizard." Below this is a table with a dark blue header row containing "Languages (+ Add)" circled in red. The table has two columns: "Language" and "Primary?". The first row of the table contains "No Records Found" and an empty cell. At the bottom, there are "Previous" and "Save" buttons with arrows.

**Step 13:** Select the *Language* and indicate if it is the *Primary* language.



A form for selecting a language. It has a light blue background. At the top, it says "Select the Language and indicate if it is the Primary Language and click the Save button." Below this is a form box containing a "Language:" label, a dropdown menu with "English" selected, a "Primary?:" label, and an unchecked checkbox. A red arrow points to the checkbox. Below the form box are "Save" and "Cancel" buttons. A yellow callout bubble at the bottom contains the text: "Note: Check this box if this is the Primary Language."

**Step 14:** Click **Save**.

Select the Language and indicate if it is the Primary Language and click the Save button.

Language:

Primary?:

**Step 15:** When complete, click **Save**.

**Person Profile** Step 4 of 4

You may add, edit and delete multiple languages for this person using this wizard.

Languages ( + Add)			
Edit	Delete	Language	Primary?
		English	True

**Step 16:** Enter the *Begin Date* when he/she became this student's guardian, confirm *Relationship* to the student, and click **Save**.

NOTE: The date defaults to the student's date of birth.

**Student Guardians** Step 1 of 1

You may add and remove the student's guardians using this wizard. You may also add and remove parents using this wizard. You also have the ability to select from historical guardians associated with this student.

Please enter the date that **Kenzie Schmitt** began being this student's guardian.

**Kenzie Schmitt**

Begin Date:  \* MM/DD/YYYY

Relationship:

**Step 17:** To add additional parent/guardian to this student, repeat steps 2-15.

Current Parent/Guardian(s) (+ Add)								
Edit	Remove	Parent/Guardian	Addresses		Phones		Languages	
		<b>Kenzie Schmitt</b> Mother Begin: 4/7/2002 Interpreter Needed: <input type="checkbox"/>	<b>Type</b>	<b>Address (Modify)</b>	<b>Type</b>	<b>Number (Modify)</b>	<b>Language (Modify)</b>	<b>Primary?</b>
			Home	123 Happy Lane Harrisburg, IL 62976	Home	(618) 272-7470	English	<input checked="" type="checkbox"/>

You may select guardians from the Historical Guardians list below for this student.

Historical Guardian(s)			
Relationship	Name	Begin Date	End Date
No Records Found			

Note: You may not add, edit, remove or select surrogate parents. Surrogates may only be assigned by ISBE staff and are shown here for informational purposes only.

**Return**

**Step 18:** When complete, click **Return**.



# Creating a Case Load

On your **Landing Page**, you will find the students in your caseload under the *My IEP Students* section.

My IEP Students			
SISID	Name	Birthdate	Home School
No Records Found			
(Page 1 of 1)	Page 1	Items Per Page 20	Navigation icons
<a href="#">View All</a>			

**Step 1:** To add students to your case load from the **Landing Page**, click **Search for an IEP Student**.



**Step 2:** You can search for a student by entering either his/her *SIS ID*, or the combination of the *Last Name*, *First Name*, *Date of Birth*, and *Gender*.

A screenshot of the "Student Search" form. The form is divided into two sections: "SIS Required" and "Advanced". The "SIS Required" section is highlighted with a red box and contains fields for "SIS ID", "Last Name", "First Name", "DOB" (with a date format hint of MM/DD/YYYY), and "Gender". The "Advanced" section contains fields for "Exact Name Match" (checkbox), "Grade", "Ethnicity", "Mother's Maiden Name", "Guardian Last Name", and "Guardian First Name". There are "Search" and "Clear Search" buttons at the bottom. A note at the bottom states: "\* Note: To search for students you must provide either the SIS ID, or the combination of Last Name, First Name, Date of Birth (DOB) and Gender." The top of the form shows "Recent:" and "Student Search".

**Step 3:** Once you have entered this information, click **Search**.



**Step 4:** Click **Select** to add student to your case load.

The screenshot shows a web interface with a top navigation bar containing 'Search', 'My Students', 'My SIS Students', and 'Age of Majority'. Below this is a 'Selected Student Details' section with the following information:

First Name: DemoMckenzie	DOB: 4/7/2002 (16 yrs 0 mo)	SIS ID: 999999081
Middle Name: Magda	Gender: Female	Native Language: Spanish
Last Name: Watson	Grade: 6th	Home Language: Spanish
Home School: Harrisburg CUSD 3	Enrollment Date:	Mother's Maiden Name:
Serving School: Harrisburg CUSD 3	Exit Date:	Ethnicity: Hispanic or Latino
Exit Type:	Exit Status:	FTE:

Below the details are 'Select' and 'New Search' buttons. Underneath is a 'Students Search Results' table:

View	Select	SIS Id	Name	Birthdate	Gender	Ethnicity
<input type="radio"/>	<input checked="" type="radio"/>	999999081	Watson, DemoMckenzie Magda	4/7/2002	Female	Hispanic or Latino

**Step 5:** Once you add a student, you will have view only access. To change your access level for this student, click **Current/Create IEP**.

The screenshot shows a navigation bar with tabs: 'Profile', 'Current/Create IEP', 'Archived IEPs', and 'Activity Log'. The 'Current/Create IEP' tab is highlighted with a red box. Below the navigation bar, the student's name 'DemoMckenzie Magda Watson' and other details are visible. A 'Transportation' section is also present with a link to modify transportation.

**Step 6:** Select the correct *Resident District*, and click **Continue**.

NOTE: If this is the first time this student's record has been visited, you will need to add a new IEP package. Choose the *Resident District* to be associated with this student's IEP.

The screenshot shows the 'Add IEP Package' wizard, Step 1 of 2. The instruction is: 'Please select the Resident District for this IEP package.' Below this is a dropdown menu for 'Resident District' with 'Harrisburg CUSD 3' selected. There is a 'Show All Districts' checkbox which is unchecked. At the bottom, there are two radio buttons: 'Continue - Please continue the wizard.' (selected) and 'Cancel - Please exit the wizard.' Below these are 'Cancel' and 'Continue' buttons. The 'Continue' button is circled in red.



**Step 7:** You can add the *Parent/Guardian(s)* information at this time or choose to enter it at a later time. See [Parents/Guardians](#) for instructions.

Current Parent/Guardian(s) (+ Add)					
Edit	Remove	Parent/Guardian	Addresses	Phones	Languages
No Records Found					

**Step 8:** Click save, then **Continue**.

Save - Please save the IEP Package.  
 Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Continue →](#)

**Step 9:** To add users to the *Access List*, see [Adding Users to the Access List](#).

(Add me!)

Access List (+ Add)									
Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
No Records Found									

You can select a user from the list of common user for your district.

Common Users							
Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	Iep Case Manager
<input checked="" type="checkbox"/>	Gray, Train09Olivia	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 10:** Once users have been added to the Access List, click **Return**.

Return  
 Cancel - Please exit the wizard.

[Cancel](#) [Return →](#)

**Step 11:** The student you created a case load for will then appear in *My Students*.

Facility Search IEP Quality **My Students:**

Profile Current/Create IEP Archived IEPs Activity Log

# Create an IEP/ Setup a Conference

To begin the IEP process, you will need to *Setup a Conference*. These steps will guide you through the wizard to *Setup a Conference*, which will create the *Notification of Conference* and *Conference Summary*.

**Step 1:** From the **Landing Page**, click on a student in your case load for whom you would like to create an IEP.



**Step 2:** On the **Student Profile** page click **Current/Create IEP**.



**Step 3:** Enter a *Purpose of Visit* and click **Save**.



**Step 4:** This will open to the *IEP Overview* tab. Click **Setup a Conference**.

The screenshot shows the 'IEP Overview' tab for a student named DemoMckenzie Magda Watson. The student's SIS ID is 999999081 and their date of birth is 4/7/2002 (16 yrs 0 mo). The 'Setup a Conference' button is highlighted with a red box. Other buttons include 'Add Form', 'Print IEP', 'Delete/Hide IEP Package', 'IEP Timeline', 'Print History', 'Activity Log', and 'Attachments'. Below the buttons, the IEP is currently set to '(Select Others)', the year is 2018, the status is Draft, and the resident district is Harrisburg CUSD 3.

**Step 5:** Enter the *Form Date*.

The screenshot shows the 'Purpose of Conference' form. The 'Form Date' field is highlighted with a red box and contains the date 11/11/2017. Below the date field is a list of purposes for the conference, each with a checkbox and a description:

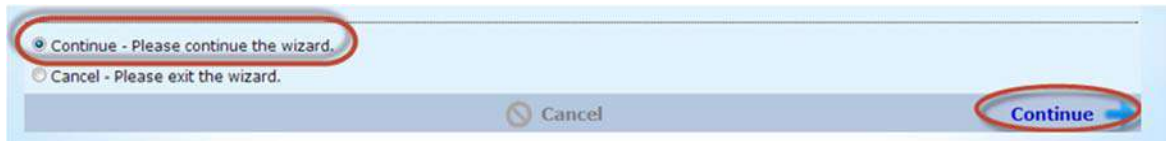
- Review of Existing Data** - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
- Initial Evaluation/Eligibility** - Review your child's recent evaluation to determine initial eligibility for special education and related services.
- Reevaluation** - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
- Initial IEP** - Review your child's need for special education and related services and placement and develop an initial IEP.
- IEP Review and Revision** - Review and/or revise your child's IEP to determine special education and related services and placement.
- Secondary Transition** - Consider postsecondary goals and transition services (beginning at age 14 1/2).
- FBA/BIP** - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
- MDR** - Consider relatedness of your child's disability to a disciplinary code violation(s).
- Graduation** - Review your child's anticipated date of graduation.
- Other** - (e.g. Termination of Placement, Aging Out) :

**Step 6:** Select the *Purpose of Conference*.

The screenshot shows the 'Purpose of Conference' form with the 'Initial Evaluation/Eligibility' checkbox selected. The 'Select' column is circled in red. The list of purposes is the same as in the previous screenshot:

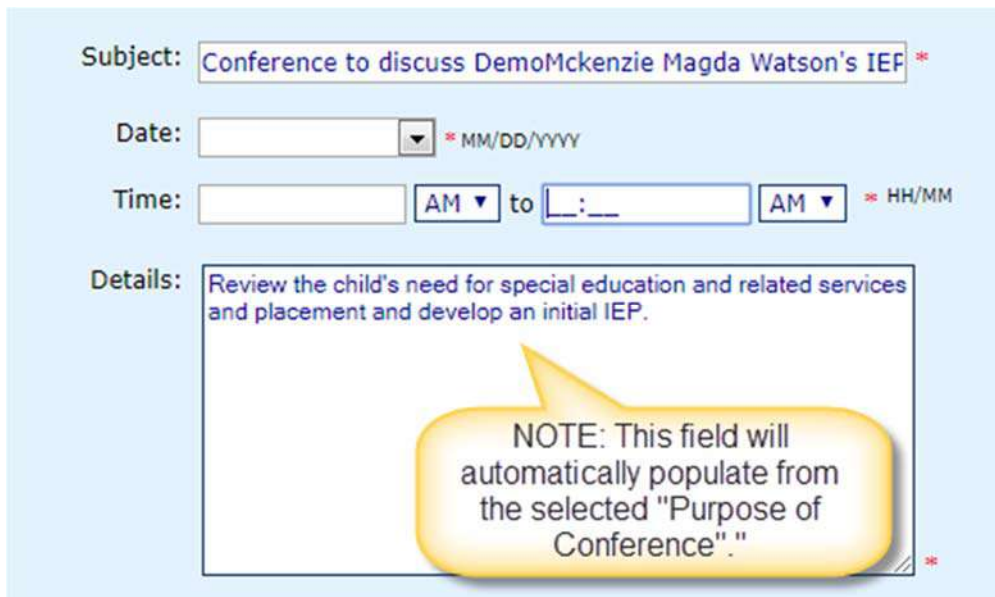
- Review of Existing Data** - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
- Initial Evaluation/Eligibility** - Review your child's recent evaluation to determine initial eligibility for special education and related services.
- Reevaluation** - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
- Initial IEP** - Review your child's need for special education and related services and placement and develop an initial IEP.
- IEP Review and Revision** - Review and/or revise your child's IEP to determine special education and related services and placement.
- Secondary Transition** - Consider postsecondary goals and transition services (beginning at age 14 1/2).
- FBA/BIP** - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
- MDR** - Consider relatedness of your child's disability to a disciplinary code violation(s).
- Graduation** - Review your child's anticipated date of graduation.
- Other** - (e.g. Termination of Placement, Aging Out) :

**Step 7:** Click **Continue**.



A horizontal navigation bar with a light blue background. On the left, there are two radio buttons: the first is selected and labeled "Continue - Please continue the wizard.", and the second is unselected and labeled "Cancel - Please exit the wizard.". In the center, there is a "Cancel" button with a circular icon. On the right, there is a "Continue" button with a blue arrow icon. Both the "Continue" radio button and the "Continue" button are circled in red.

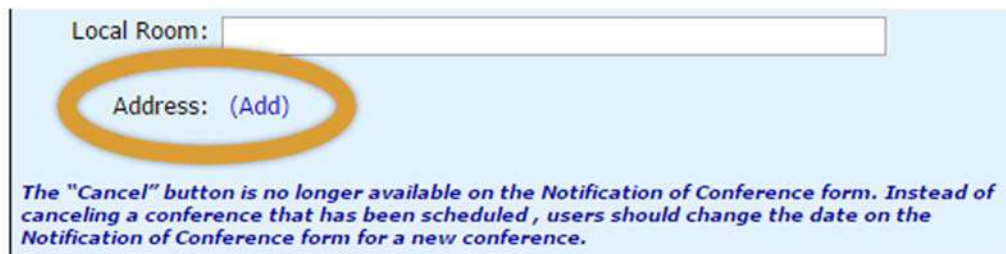
**Step 8:** Enter information regarding the time and place of the conference.



A form with a light blue background. It contains the following fields:

- Subject:** A text box containing "Conference to discuss DemoMckenzie Magda Watson's IEP" with a red asterisk to the right.
- Date:** A date picker field with a dropdown arrow and a red asterisk, followed by the text "\* MM/DD/YYYY".
- Time:** Two time input fields, each with a dropdown arrow and a red asterisk, followed by the text "\* HH/MM". The first field contains "AM" and the second contains "AM".
- Details:** A text area containing the text "Review the child's need for special education and related services and placement and develop an initial IEP." Below this text area is a yellow callout box with a speech bubble tail pointing to the text area. The callout box contains the text: "NOTE: This field will automatically populate from the selected 'Purpose of Conference'." with a red asterisk to the right.

**Step 9:** To add an *Address*, click **Add**.



A form with a light blue background. It contains the following fields:

- Local Room:** A text box.
- Address:** A text box containing the text "(Add)". This text box is circled in orange.

*The "Cancel" button is no longer available on the Notification of Conference form. Instead of canceling a conference that has been scheduled, users should change the date on the Notification of Conference form for a new conference.*

**Step 10:** Enter the *Address, City, State, Zip*, and click **Save**.

A screenshot of a form with the following fields and values: Address: 123 Happy Lane; City: Harrisburg; State: Illinois; Zip: 62976. The 'Save' button is circled in red.

**Step 11:** When finished, click **Continue**.

A screenshot of a wizard navigation bar. It features three radio buttons: 'Continue - Please continue the wizard.' (selected and circled in red), 'Save and Exit - Please save this form and exit the wizard.', and 'Cancel - Please exit the wizard.'. Below the radio buttons are three buttons: 'Previous' with a left arrow, 'Cancel' with a power icon, and 'Continue' with a right arrow (circled in red).

**Step 12:** Add or edit the parent/guardian(s) for this student if you have not already done so on the student's profile page. See [Parents/Guardians](#) for instructions.

A screenshot of a page with a link 'Click Here to Add meeting notes' and a button 'Current Parent/Guardian(s) Add'. A yellow callout box points to the link with the text: 'NOTE: Click the drop-down arrows to Add meeting notes'.

**Step 13:** When complete, click **Continue**.

A screenshot of a wizard navigation bar, identical to the one in Step 11. The 'Continue' button is circled in red.

**Step 14:** Click **Add** to set up *Conference Attendees* if you have not already done so.

Click Here to Add meeting notes

Conference Attendees (Add)										
Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages				
	None listed.	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th></th><th>Primary?</th></tr></thead><tbody><tr><td>English</td><td><input checked="" type="checkbox"/></td></tr></tbody></table>		Primary?	English	<input checked="" type="checkbox"/>
	Primary?									
English	<input checked="" type="checkbox"/>									
		Train09Olivia Gray		<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th></th><th>Primary?</th></tr></thead><tbody><tr><td>No Records Found</td><td><input type="checkbox"/></td></tr></tbody></table>		Primary?	No Records Found	<input type="checkbox"/>
	Primary?									
No Records Found	<input type="checkbox"/>									

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 15:** Here you will be able to add the student as a conference attendee or *Search for Conference Attendee*.

**IEP Conference Setup** Step 4 of 7

You are setting up attendees for this conference. Guardians and IEP team members are required to attend. You may Remove or Excuse any attendee and fill out an excusal form as necessary. You may also search for and add any new attendees. [Help](#)

*This information will be saved when you click Continue at the bottom of the wizard.*

Click Here to Add meeting notes

**Search for Conference Attendee**

- Add Meeyah Reigh Ann Adams
- Search for School Personnel.
- Search for Other Individual.
- Add Unknown Person by Title.

Select the desired search criteria of the conference attendee you would like to add.

NOTE: If you choose to add conference attendees using the personnel search, you will be able to add multiple staff to the conference at once. To add multiple staff, click the check box located under the *Multi Select* column. Once you have selected the desired conference attendees from the *Personnel Search Results* grid, click the **Use Selected** button to add the attendees.

Click Here to Add meeting notes

**Personnel Search**

**Multiple** OR  **Single**

District:  IEIN:

Last Name:

First Name:

Gender:

Include Retired

Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

**Personnel Search Results**

**Use Selected**

Multi Select All / None	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input type="checkbox"/>	9000028	DemoAngie D Baker	Female	White, Non-Hispanic	Wabash & Ohio Valley Sp Ed Dist		
<input type="checkbox"/>	9000034	DemoMarisa Bell	Female	Native Hawaiian or Other Pacific Islander	Wabash & Ohio Valley Sp Ed Dist		
<input type="checkbox"/>	9000024	DemoReina Brooks	Female	White, Non-Hispanic	Wabash & Ohio Valley Sp Ed Dist		
<input type="checkbox"/>	9000165	Train15Jess Brown	Female	Native Hawaiian or Other Pacific Islander	Wabash & Ohio Valley Sp Ed Dist		

**Step 16:** To log *Contact Attempts*, click the pencil.

Click Here to Add meeting notes

**Conference Attendees ( Add)**

Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages				
✗	<input type="button" value="None listed."/>	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">English</td> <td style="width: 20%; text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td colspan="2" style="text-align: right;"><b>Primary?</b></td> </tr> </table>	English	<input checked="" type="checkbox"/>	<b>Primary?</b>	
English	<input checked="" type="checkbox"/>									
<b>Primary?</b>										
✗		Train09Olivia Gray		<input type="checkbox"/>	<input type="checkbox"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">No Records Found</td> <td style="width: 20%; text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td colspan="2" style="text-align: right;"><b>Primary?</b></td> </tr> </table>	No Records Found	<input type="checkbox"/>	<b>Primary?</b>	
No Records Found	<input type="checkbox"/>									
<b>Primary?</b>										

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 17:** Enter all attempts to contact the guardian.

Guardian Name: **Schmitt, Kenzie**

Please enter all attempts to contact this guardian below.

Show these contact attempts on Conference Summary Report for this guardian

**Apply these contact attempts to the following guardians as well.**

Selected	Guardian Name
<input type="checkbox"/>	No Records Found

**Step 18:** To apply attempts to other guardian(s) listed below, click the box under the *Selected* column and click **Save**.

Please enter all attempts to contact this guardian below.

Show these contact attempts on Conference Summary Report for this guardian

**Apply these contact attempts to the following guardians as well.**

Selected	Guardian Name
<input type="checkbox"/>	No Records Found

Save - Please save the attempts to contact the parent/guardian.

Cancel - Please exit the wizard.



**Step 19:** To *Remove/Excuse* an attendee, click the **Red X**.

Click Here to Add meeting notes

Conference Attendees (+ Add)										
Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages				
<input type="checkbox"/>	None listed.	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th></th><th>Primary?</th></tr></thead><tbody><tr><td>English</td><td><input checked="" type="checkbox"/></td></tr></tbody></table>		Primary?	English	<input checked="" type="checkbox"/>
	Primary?									
English	<input checked="" type="checkbox"/>									
<input checked="" type="checkbox"/>		Train09Olivia Gray		<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th></th><th>Primary?</th></tr></thead><tbody><tr><td>No Records Found</td><td><input type="checkbox"/></td></tr></tbody></table>		Primary?	No Records Found	<input type="checkbox"/>
	Primary?									
No Records Found	<input type="checkbox"/>									

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 20:** Decide if an official excusal needs to be sent to the parent/guardian and answer appropriately.

**Attendee Excusal**

You have chosen to excuse an attendee from this meeting.

Does this excusal need an official excusal form to be sent to the parent/guardian?

**Step 21:** If yes, enter the *Method of Communication*, *Excusal Reason*, and *Member's Content Area*.

Team Member Name: Train09Olivia Gray

Method of Communication	
Method	
<input type="checkbox"/>	Exchanged e-mails
<input type="checkbox"/>	Exchanged faxes
<input type="checkbox"/>	Met in person
<input type="checkbox"/>	Spoke on the phone

Excusal Reason:

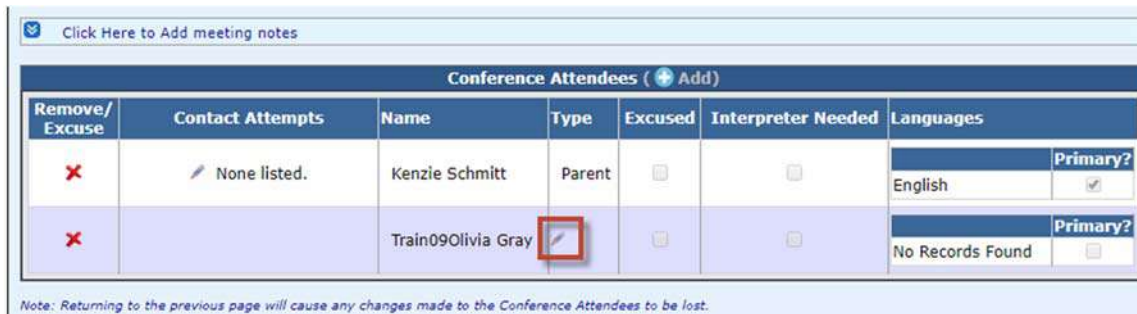
Member's Content Area:

**Step 22:** When complete, click **Save**.



A light blue dialog box with a white background. At the top, there are two radio buttons: the first is selected and labeled "Save - Please save this team member excusal.", and the second is labeled "Cancel - Please exit the wizard." Below the radio buttons, there is a "Cancel" button with a circular icon and a "Save" button with a blue arrow icon. Both the "Save" radio button and the "Save" button are circled in red.

**Step 23:** To edit attendee roles under *Type* column, click the pencil.



A screenshot of a web application interface showing a table of conference attendees. The table has columns for "Remove/Excuse", "Contact Attempts", "Name", "Type", "Excused", "Interpreter Needed", and "Languages". The "Type" column for the second attendee, "Train09Olivia Gray", has a pencil icon circled in red. Below the table, there is a note: "Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost."

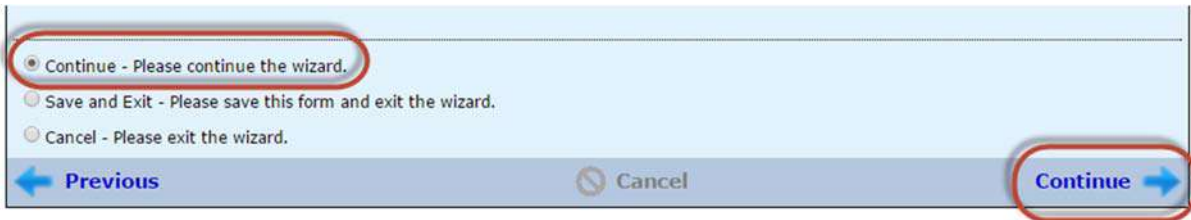
Conference Attendees ( + Add)							
Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages	
✘	None listed.	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
✘		Train09Olivia Gray		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 24:** Select desired role for the attendee, then click **Save**.

Roles	
Selected	Role
<input type="checkbox"/>	Assistant Principal
<input type="checkbox"/>	Bilingual Specialist
<input type="checkbox"/>	Case Manager
<input type="checkbox"/>	Director of Special Education - Cooperative
<input type="checkbox"/>	Director of Special Education - District
<input type="checkbox"/>	General Education Teacher
<input type="checkbox"/>	Guidance Counselor
<input type="checkbox"/>	Interpreter
<input type="checkbox"/>	LEA Representative
<input type="checkbox"/>	Occupational Therapist
<input type="checkbox"/>	Paraprofessional/Teacher Aide
<input type="checkbox"/>	Physical Therapist
<input type="checkbox"/>	Principal
<input type="checkbox"/>	School Nurse
<input type="checkbox"/>	School Psychologist
<input type="checkbox"/>	School Psychologist Intern
<input type="checkbox"/>	School Social Worker
<input type="checkbox"/>	School Social Worker Intern
<input type="checkbox"/>	Special Education Teacher
<input type="checkbox"/>	Special Education Coordinator/Supervisor
<input type="checkbox"/>	Special Education Department Head
<input type="checkbox"/>	Speech & Language Pathologist
<input type="checkbox"/>	Student Teacher
<input type="checkbox"/>	Superintendent
<input type="checkbox"/>	Other: <input type="text"/>

**Step 25:** When complete, click **Continue**.



A horizontal navigation bar with three radio buttons: 'Continue - Please continue the wizard.' (selected), 'Save and Exit - Please save this form and exit the wizard.', and 'Cancel - Please exit the wizard.'. Below the buttons are three buttons: 'Previous' with a left arrow, 'Cancel' with a circle and slash, and 'Continue' with a right arrow. The 'Continue' button is highlighted with a red circle.

**Step 26:** Enter *Dates of Most Recent Evaluation*, and *Date of Next Reevaluation*, if known.



**Conference Information**

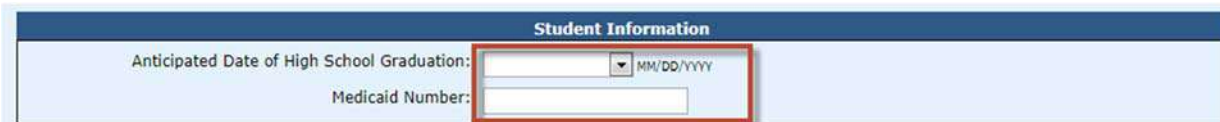
These dates are determined from the date on official eligibility forms if any or from the date provided by you in the process of entering disabilities without having to do the eligibility forms.

Date of Most Recent Evaluation:  MM/DD/YYYY

Date of Next ReEvaluation:  MM/DD/YYYY

The two date input fields are highlighted with a red circle.

**Step 27:** Enter the *Anticipated Date of High School Graduation*, if known. If student has a *Medicaid Number*, enter it here.



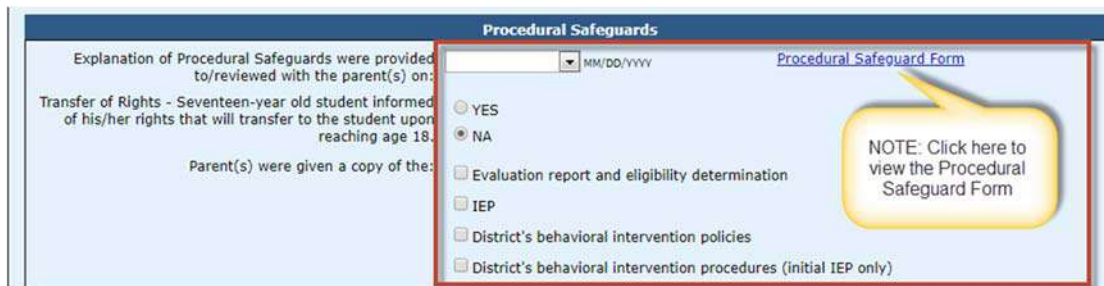
**Student Information**

Anticipated Date of High School Graduation:  MM/DD/YYYY

Medicaid Number:

The date and text input fields are highlighted with a red circle.

**Step 28:** Enter information on *Procedural Safeguards*.



**Procedural Safeguards**

Explanation of Procedural Safeguards were provided to/reviewed with the parent(s) on:  MM/DD/YYYY [Procedural Safeguard Form](#)

Transfer of Rights - Seventeen-year old student informed of his/her rights that will transfer to the student upon reaching age 18.

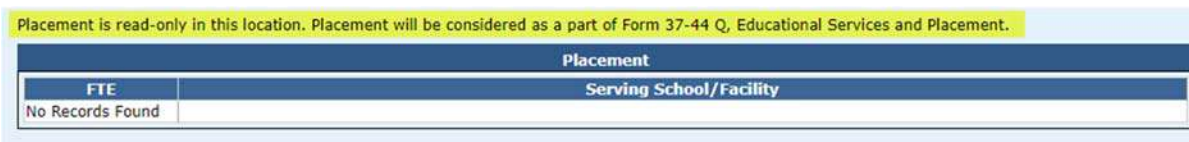
Parent(s) were given a copy of the:

- YES
- NA
- Evaluation report and eligibility determination
- IEP
- District's behavioral intervention policies
- District's behavioral intervention procedures (initial IEP only)

**NOTE:** Click here to view the Procedural Safeguard Form

The entire form content is highlighted with a red border.

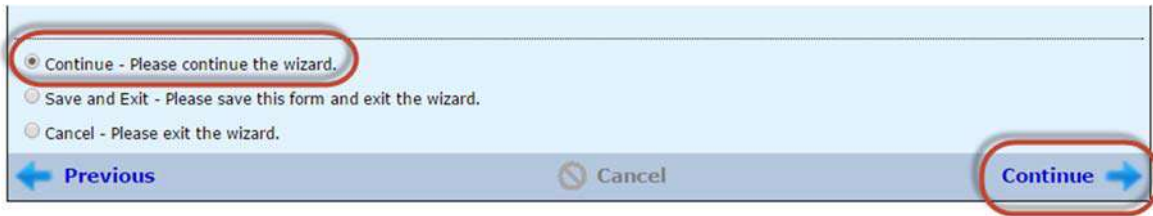
**Step 29:** Placement is populated by *Educational Placement and Services* automatically.



Placement is read-only in this location. Placement will be considered as a part of Form 37-44 Q, Educational Services and Placement.

Placement	
FTE	Serving School/Facility
No Records Found	

**Step 30:** When complete, Click **Continue**.



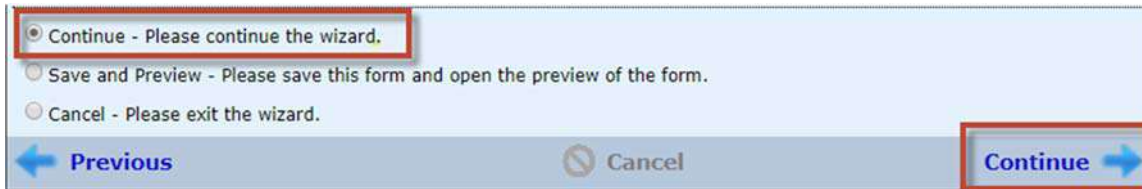
Wizard navigation screen with three radio button options: "Continue - Please continue the wizard.", "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard." Below the options are three buttons: "Previous" (with a left arrow), "Cancel" (with a crossed-out circle), and "Continue" (with a right arrow). The "Continue" button is highlighted with a red box.

**Step 31:** To verify, modify, and/or add to the *Default Contact List*, see **IEP Form Contacts** for instructions.

[Click Here to Add meeting notes](#)

Form Contact List (X Modify) (Clear)				
Contact	Sincerely	Personnel	Title(s)	Phone(s)
<input checked="" type="radio"/>	<input type="radio"/>	Allen, DemoPaloma	<b>Title (Modify)</b> Director of Special Education - District	<b>Type</b> <b>Number (Modify)</b> Work (618) 272-7470 Ext. 123
<input type="radio"/>	<input checked="" type="radio"/>	Thomas, DemoLynda	<b>Title (Modify)</b> No Records Found	<b>Type</b> <b>Number (Modify)</b> No Records Found

**Step 32:** After completing the *Default Contact List*, click **Continue**.



Wizard navigation screen with three radio button options: "Continue - Please continue the wizard.", "Save and Preview - Please save this form and open the preview of the form.", and "Cancel - Please exit the wizard." Below the options are three buttons: "Previous" (with a left arrow), "Cancel" (with a crossed-out circle), and "Continue" (with a right arrow). The "Continue" button is highlighted with a red box.

**Step 33:** Click the box of the forms you would like to add to the conference from the *IEP Forms*, *Notice and Consent Forms*, *Eligibility Forms*, and *Other Forms* tab.

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Data Chart	Form 34-54F
<input type="checkbox"/>	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
<input type="checkbox"/>	Secondary Transition	Form 34-54H-I
<input type="checkbox"/>	Functional Behavioral Assessment	Form 34-54J
<input type="checkbox"/>	Behavioral Intervention Plan	Form 34-54K-L
<input type="checkbox"/>	Goals and Objectives	Form 34-54M
<input type="checkbox"/>	Educational Accommodations and Support	Form 34-54N
<input type="checkbox"/>	Assessment	Form 34-54O
<input type="checkbox"/>	Educational Services and Placement	Form 34-54P
<input type="checkbox"/>	Educational Services and Placement (Page 2)	Form 34-54Q
<input type="checkbox"/>	Manifestation Determination	Form 34-54R
<input type="checkbox"/>	Additional Notes/Information	Form 34-54S

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Notification of Conference Recommendations	Form 34-57E
<input type="checkbox"/>	Consent For Outside Agency Invitation	Form 34-57L

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Documentation of Evaluation Results	Form 34-54A
<input type="checkbox"/>	Eligibility Determination (Other than SLD)	Form 34-54B
<input type="checkbox"/>	Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
<input type="checkbox"/>	Eligibility Determination (SLD)	Form 34-54D-E

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Autism Considerations	Form 34-54V
<input type="checkbox"/>	Summary of Performance	Form 34-60

**Step 34:** When complete, click **Save**.



**Step 35:** I-Star will then open to the *IEP Overview* page. To view the IEP you created, select the **IEP Timeline** tab.



**Step 36:** Click the double vertical row arrows to expand the forms associated with the conference.



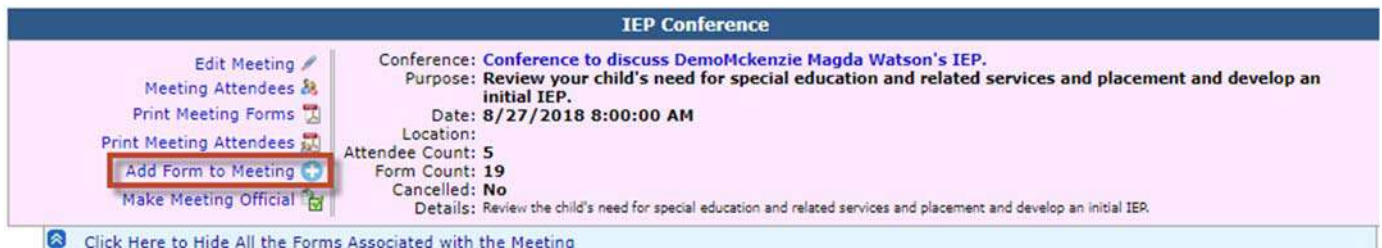
## Add Form to Meeting

To add a form to the meeting, follow the steps below.

NOTE: The *IEP Timeline* conference tools:

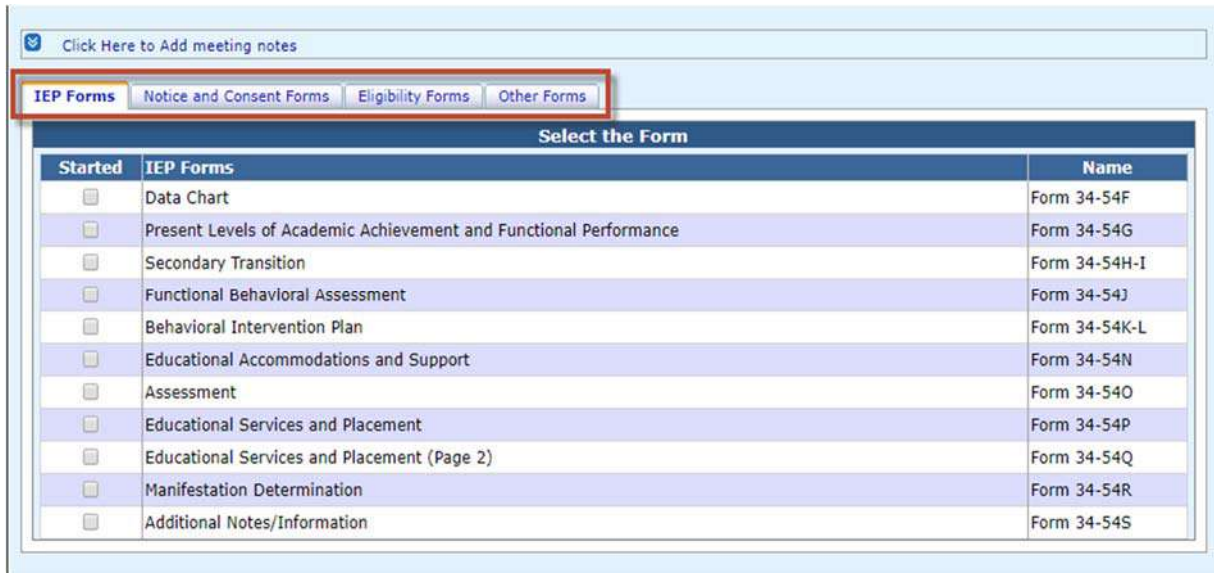


**Step 1:** In the pink section of the *IEP Conference*, click **Add Form to Meeting**.





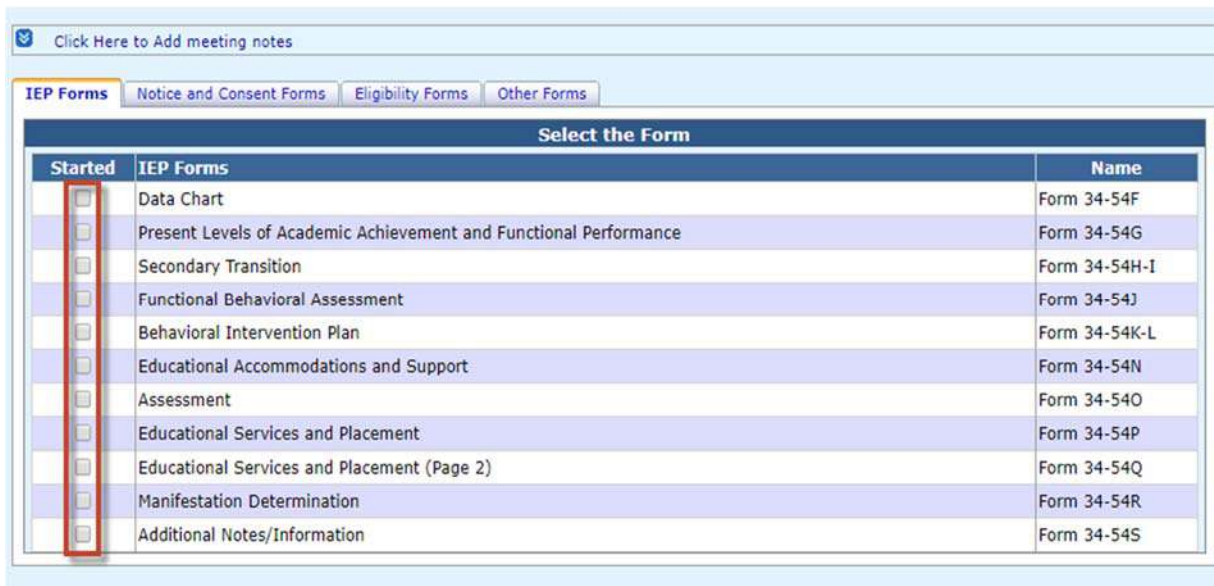
**Step 2:** By clicking the respective tabs, choose the form(s) you wish to add to the meeting.



The screenshot shows a web interface with a header bar containing a link "Click Here to Add meeting notes". Below the header is a navigation menu with four tabs: "IEP Forms", "Notice and Consent Forms", "Eligibility Forms", and "Other Forms". The "IEP Forms" tab is highlighted with a red border. Below the tabs is a table titled "Select the Form". The table has three columns: "Started", "IEP Forms", and "Name". The "Started" column contains checkboxes. The "IEP Forms" column lists various form types, and the "Name" column lists their corresponding form numbers.

Started	IEP Forms	Name
<input type="checkbox"/>	Data Chart	Form 34-54F
<input type="checkbox"/>	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
<input type="checkbox"/>	Secondary Transition	Form 34-54H-I
<input type="checkbox"/>	Functional Behavioral Assessment	Form 34-54J
<input type="checkbox"/>	Behavioral Intervention Plan	Form 34-54K-L
<input type="checkbox"/>	Educational Accommodations and Support	Form 34-54N
<input type="checkbox"/>	Assessment	Form 34-54O
<input type="checkbox"/>	Educational Services and Placement	Form 34-54P
<input type="checkbox"/>	Educational Services and Placement (Page 2)	Form 34-54Q
<input type="checkbox"/>	Manifestation Determination	Form 34-54R
<input type="checkbox"/>	Additional Notes/Information	Form 34-54S

**Step 3:** Click the box for the name of the form(s) you would like to add.



This screenshot is identical to the one above, showing the "Select the Form" table. A red rectangular box highlights the "Started" column, specifically the checkboxes for each row, indicating the step of selecting the form(s) to add.

Started	IEP Forms	Name
<input type="checkbox"/>	Data Chart	Form 34-54F
<input type="checkbox"/>	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
<input type="checkbox"/>	Secondary Transition	Form 34-54H-I
<input type="checkbox"/>	Functional Behavioral Assessment	Form 34-54J
<input type="checkbox"/>	Behavioral Intervention Plan	Form 34-54K-L
<input type="checkbox"/>	Educational Accommodations and Support	Form 34-54N
<input type="checkbox"/>	Assessment	Form 34-54O
<input type="checkbox"/>	Educational Services and Placement	Form 34-54P
<input type="checkbox"/>	Educational Services and Placement (Page 2)	Form 34-54Q
<input type="checkbox"/>	Manifestation Determination	Form 34-54R
<input type="checkbox"/>	Additional Notes/Information	Form 34-54S

**Step 4:** Once you select the desired form, you will enter the wizard to complete the form in the student's IEP.

# IEP Forms

IEP Forms    Notice and Consent Forms    Eligibility Forms    Other Forms

Select the Form

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

# Data Chart

**Step 1:** From the *IEP Forms* tab, select the **Data Chart** form.

The screenshot shows a web interface with a tabbed menu at the top: "IEP Forms", "Notice and Consent Forms", "Eligibility Forms", and "Other Forms". The "IEP Forms" tab is active. Below the tabs is a table titled "Select the Form". The table has three columns: "Started", "IEP Forms", and "Name". The "Data Chart" row is highlighted with a red box around the text "Data Chart".

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Select a meeting, or click **Add** to add a new meeting. If you are adding a new meeting, see [Create an IEP/ Setup a Conference](#).

The screenshot shows a dialog box titled "Select a meeting (+ Add)". It contains a table with columns "Select", "First Meeting Date", and "Subject". The "Select" column has a radio button selected. The "First Meeting Date" is "4/26/2018 8:00:00 AM" and the "Subject" is "Conference to discuss DemoMckenzie Magda Watson's IEP.". Below the table is a checkbox labeled "Show past meetings that are no more than 1 Week old" which is checked. A green callout box with an arrow points to the checkbox and contains the text: "NOTE: You may check the box and filter by past meeting dates."

Select	First Meeting Date	Subject
<input checked="" type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

**Step 3:** Click Continue.

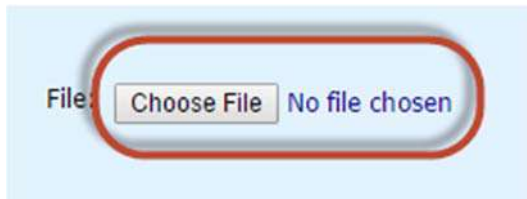
The screenshot shows a wizard navigation bar with two radio buttons: "Continue - Please continue the wizard." (selected) and "Cancel - Please exit the wizard." Below the buttons are "Cancel" and "Continue" buttons. The "Continue" button is highlighted with a red box.

**Step 4:** Click **Add** to *Insert Data Chart*.

The screenshot shows a dialog box titled "Report of Performance (Insert Data Chart)". It has a table with columns "View", "Edit", "Delete", and "Description". The "Add" button is highlighted with a red circle. The table contains the text "No Records Found".

View	Edit	Delete	Description
No Records Found			

**Step 5:** Click **Choose File**.



**Step 6:** Search *File Name*, select the file, and click **Open**.



**Step 7:** Once the Data Chart is imported, click **Save**.



**Step 8:** When complete, click **Save**.



# Present Levels of Academic Achievement and Functional Performance

**Step 1:** From the *IEP Forms* tab, click the **Present Levels of Academic Achievement and Functional Performance** form.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	<b>Present Levels of Academic Achievement and Functional Performance</b>	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Enter the *Student's Strengths* in the text box below.

Remarks

Student's Strengths

Type the student's strengths here.

**Step 3:** Enter the *Parental Educational Concerns/Input* in the text box below.

Parental Educational Concerns / Input

Type the Parental Educational Concerns/ Input here.

**Step 4:** When complete, click **Continue**.

**Academic Achievement** Step 2 of 4

When completing this page include all areas that are impacted by the student's disability(s). The present levels of academic achievement and functional performance should be descriptive statements addressing both areas and showing a relationship to the Illinois Learning Standards. [Help](#)

This information will be saved when you click Continue at the bottom of the wizard.

[Click Here to Add meeting notes](#)

**Present Levels of Academic Achievement and Functional Performance**

Remarks
Student's Strengths
Parental Educational Concerns / Input

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

HINT: To save your work while periodically working in the wizard, click "Save Now."

[Previous](#) [Cancel](#) [Save Now](#) [Continue](#)

**Step 5:** To add *Academic Achievement*, click **Add**.

Student's Present Level of Academic Achievement (Include strengths and areas needing improvement)

Academic Achievement ( + Add)		
Actions	Area	Remarks
No Records Found		

**Step 6:** Enter the *Academic Achievement Area* and *Remarks*.

[Click Here to Add meeting notes](#)

Academic Achievement (Current or past academic achievement data pertinent to current educational performance.)

Area:

Remarks:

[Save](#) [Cancel](#)

**Step 7:** When complete, click **Save**.

Academic Achievement (Current or past academic achievement data pertinent to current educational performance.)

Area:

Remarks:

**Step 8:** To add *Functional Performance*, click **Add**.

Student's Present Levels of Functional Performance (Include strengths and areas needing improvement)

Functional Performance <input type="button" value="+ Add"/>		
Actions	Area	Remarks
No Records Found		

**Step 9:** Enter *Functional Performance Area* and *Remarks*.

[Click Here to Add meeting notes](#)

Functional Performance (Current or past functional performance data pertinent to current functional performance.)

Area:

Remarks:

**Step 10:** When complete, click **Save**.

Functional Performance (Current or past functional performance data pertinent to current functional performance.)

Area: \*

Remarks:

**Step 11:** Click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

**Step 12:** Describe the effect of this individual's disability on involvement and progress in the general education curriculum and the functional implications of the student's skills.

**Academic Achievement** Step 4 of 4

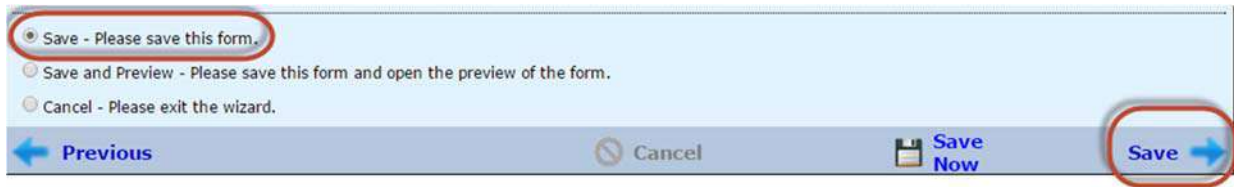
When completing this page include all areas that are impacted by the student's disability(s). The present levels of academic achievement and functional performance should be descriptive statements addressing both areas and showing a relationship to the Illinois Learning Standards. [Help](#)

**Present Levels of Academic Achievement and Functional Performance**

Remarks
Describe the effect of this individual's disability on involvement and progress in the general education curriculum and the functional implications of the student's skills. * For a preschool child, describe the effect of this individual's disability on involvement in appropriate activities. * By age 14 1/2, describe the effect of this individual's disability on the pursuit of post-secondary expectations (living, learning, and working).



**Step 13:** When complete, click **Save**.



The image shows a horizontal navigation bar for a wizard. It features three radio buttons at the top, each with a descriptive label. Below the radio buttons is a row of four buttons: 'Previous' with a left-pointing arrow, 'Cancel' with a circle and slash icon, 'Save Now' with a floppy disk icon, and 'Save' with a right-pointing arrow. Red circles highlight the first radio button and the 'Save' button.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#)   [Cancel](#)   [Save Now](#)   [Save →](#)

# Secondary Transition

**Step 1:** From the *IEP Forms* tab, select **Secondary Transition** form.

The screenshot shows a web application interface with a tabbed menu at the top containing 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. Below the tabs is a 'Select the Form' dialog box with a table listing various forms. The 'Secondary Transition' form is highlighted with a red rectangular box.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	<b>Secondary Transition</b>	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Select **Add** to add *Assessments* for employment.

The screenshot shows a table with a header 'Assessment Data' and a sub-header 'Assessments (Add)'. The 'Add' button is circled in red. Below the header is a table with columns: 'Actions', 'Assessment Type', 'Responsible Agency', 'Date Conducted', and 'Summary of Results'. The table currently contains one row with the text 'No Records Found'.

Post Secondary Goal	Assessment Data									
Employment	Assessments (Add)									
	<table border="1"><thead><tr><th>Actions</th><th>Assessment Type</th><th>Responsible Agency</th><th>Date Conducted</th><th>Summary of Results</th></tr></thead><tbody><tr><td colspan="5">No Records Found</td></tr></tbody></table>	Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results	No Records Found			
Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results						
No Records Found										

**Step 3:** Fill out *Employment Outcomes/Goals* fields.

The screenshot shows a form titled 'Employment Outcomes/Goals'. The fields are filled out as follows:

- Assessment Type: Vocational skill Inventories/ Career Portfolios \*
- Responsible Agency: School Transition Coordinator
- Date Conducted: 10/20/2020 (dropdown menu)
- Summary of Results: Upon completion of high school, McKenzie will work part time for YMCA Intramural Program as an Assistant to the Head Basketball Coach by 20XX and part time as a construction trainee.

At the bottom of the form are 'Save' and 'Cancel' buttons.

**Step 4:** When complete, click **Save**.

**Employment Outcomes/Goals**

Assessment Type: Vocational skill Inventories/ Career Portfolios \*

Responsible Agency: School Transition Coordinator

Date Conducted: 10/20/2020 MM/DD/YYYY

Summary of Results: Upon completion of high school, McKenzie will work part time for YMCA Intramural Program as an Assistant to the Head Basketball Coach by 20XX and part time as a construction trainee. |

**Save** **Cancel**

**Step 5:** Select **Add** to add *Assessments* for education.

Education

Assessments (Add)				
Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results
No Records Found				

**Step 6:** Fill out the *Post-Secondary Education Outcomes/Goals* fields.

**Post-Secondary Education Outcomes/Goals**

Assessment Type:  \*

Responsible Agency:

Date Conducted:  MM/DD/YYYY

Summary of Results:

**Save** **Cancel**

**Step 7:** When complete, click **Save**.

**Post-Secondary Education Outcomes/Goals**

Assessment Type: Transition Surveys \*

Responsible Agency: Special Education Case Manager

Date Conducted: 10/21/2020 MM/DD/YYYY

Summary of Results: Upon completion of high school, McKenzie will enroll full time at Parkland Community College in classes related to Sports Training and Management, and Construction Management by 20XX. |

**Save** **Cancel**

**Step 8:** Select the **Add** icon to add *Assessments* for training.

Training	<b>Assessments</b> 				
	<b>Actions</b>	<b>Assessment Type</b>	<b>Responsible Agency</b>	<b>Date Conducted</b>	<b>Summary of Results</b>
	No Records Found				

**Step 9:** Fill out *Post-Secondary Training Outcomes/Goals* fields.

**Post-Secondary Training Outcomes/Goals**

Assessment Type:

Responsible Agency:

Date Conducted:     MM/DD/YYYY

Summary of Results:

**Step 10:** When complete, click **Save**.

**Post-Secondary Training Outcomes/Goals**

Assessment Type:

Responsible Agency:

Date Conducted:     MM/DD/YYYY

Summary of Results:

**Step 11:** Select **Add** to add *Assessments* for independent living.

Independent Living	<b>Assessments</b> 				
	<b>Actions</b>	<b>Assessment Type</b>	<b>Responsible Agency</b>	<b>Date Conducted</b>	<b>Summary of Results</b>
	No Records Found				

**Step 12:** Fill out the *Independent Living Outcomes/Goals*.

**Independent Living Outcomes/Goals**

Assessment Type:

Responsible Agency:

Date Conducted:  MM/DD/YYYY

Summary of Results:

**Step 13:** When complete, click **Save**.

**Independent Living Outcomes/Goals**

Assessment Type:

Responsible Agency:

Date Conducted:  MM/DD/YYYY

Summary of Results:

**Step 14:** Once all *Assessment Data* is entered, click **Continue**.

Post Secondary Goal	Assessment Data				
Employment	Assessments ( + Add)				
	Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results
	<input checked="" type="checkbox"/>	Vocational skill Inventories/ Career Portfolios	School Transition Coordinator	10/20/2020	Upon completion of high school, McKenzie will work part time for YMCA Intramural Program as an Assistant to the Head Basketball Coach by 20XX and part time as a construction trainee.
Education	Assessments ( + Add)				
	Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results
	<input checked="" type="checkbox"/>	Transition Surveys	Special Education Case Manager	10/21/2020	Upon completion of high school, McKenzie will enroll full time at Parkland Community College in classes related to Sports Training and Management, and Construction Management by 20XX.
Training	Assessments ( + Add)				
	Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results
	<input checked="" type="checkbox"/>	Transition	School Transition Coordinator	10/20/2020	Upon completion of high school, McKenzie will be participate annually in Coach Ray's Summer Coaches Clinic at University of Quality by 20XX and also apprentice with his uncle in the construction field.
Independent Living	Assessments ( + Add)				
	Actions	Assessment Type	Responsible Agency	Date Conducted	Summary of Results
	<input checked="" type="checkbox"/>	Academic Skills Probes	Special Education Case Manager	10/20/2020	Upon completion of high school, McKenzie will be able to maintain a personal finance budget. Upon completion of high school, McKenzie will maintain a professional manner when in the workplace.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

← Previous
Cancel
Continue →

**Step 15:** Enter *Post-Secondary Employment Outcomes/Goals*.

**Post-Secondary Transition Outcomes/Goals**

**Employment Outcomes/Goals** (e.g., competitive, supported shelter, non-paid employment as a volunteer or training capacity, military): AND  
 Upon completion of high school, McKenzie will work part time for YMCA Intramural Program as an Assistant to the Head Basketball Coach by 20XX and part time as a construction trainee.

**Step 16:** Enter *Post-Secondary Education Outcomes/Goals*.

**Post-Secondary Education Outcomes/Goals** (e.g., community college, 4-year university, technical/vocational/trade school): AND/OR  
 Upon completion of high school, McKenzie will enroll full time at Parkland Community College in classes related to Sports Training and Management, and Construction Management by 20XX.

**Step 17:** Enter *Post-Secondary Training Outcomes/Goals*.

**Post-Secondary Training Outcomes/Goals** (e.g., vocational or career field, vocational training program, independent living skills training, apprenticeship, OJT, job corps): AND  
 Upon completion of high school, McKenzie will participate annually in Coach Ray's Summer Coaches Clinic at University of Quality by 20XX and also apprentice with his uncle in the construction field.

**Step 18:** Enter *Post-Secondary Independent Living Outcomes/Goals*.

**Independent Living Outcomes/Goals** (e.g., independent living, health/safety, self-advocacy/future planning, transportation/mobility, social relationships, recreation/leisure, financial/income needs):  
 Upon completion of high school, McKenzie will be able to maintain a personal finance budget. Upon completion of high school, McKenzie will maintain a professional manner when in the workplace.

**Step 19:** When complete, click **Continue**.

**Post-Secondary Transition Outcomes/Goals**

**Employment Outcomes/Goals** (e.g., competitive, supported shelter, non-paid employment as a volunteer or training capacity, military): AND  
 Upon completion of high school, McKenzie will work part time for YMCA Intramural Program as an Assistant to the Head Basketball Coach by 20XX and part time as a construction trainee.

**Post-Secondary Education Outcomes/Goals** (e.g., community college, 4-year university, technical/vocational/trade school): AND/OR  
 Upon completion of high school, McKenzie will enroll full time at Parkland Community College in classes related to Sports Training and Management, and Construction Management by 20XX.

**Post-Secondary Training Outcomes/Goals** (e.g., vocational or career field, vocational training program, independent living skills training, apprenticeship, OJT, job corps): AND  
 Upon completion of high school, McKenzie will participate annually in Coach Ray's Summer Coaches Clinic at University of Quality by 20XX and also apprentice with his uncle in the construction field.

**Independent Living Outcomes/Goals** (e.g., independent living, health/safety, self-advocacy/future planning, transportation/mobility, social relationships, recreation/leisure, financial/income needs):  
 Upon completion of high school, McKenzie will be able to maintain a personal finance budget. Upon completion of high school, McKenzie will maintain a professional manner when in the workplace.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

← Previous
Cancel
Save Now
Continue →

**Step 20:** Click **Add** next to *Post-Secondary Transition Course of Study*.

Post-Secondary Transition Course of Study (+ Add)			
Edit	Delete	Year	Course
No Records Found			

**Step 21:** Enter *Year* and *Course(s)*.

Year:

Course:

**Step 22:** When complete, click **Save**.

Year:

Course:

**Step 23:** Repeat Steps 20-22 to add additional Course(s), when finished, click **Continue**.

Post-Secondary Transition Course of Study ( + Add)			
Edit	Delete	Year	Course
		Year 1	Algebra Biology IL State History PE Learning Support (Sped) English 9
		Year 2	Geometry Health/PE World History Spanish 1 Learning Support (Sped) English 10
		Year 3	US History Algebra 2 Trig SAT Prep Class Spanish 2 Learning Support (Sped) English 11
		Year 4	Auto CAD Chemistry Sports Medicine PE Learning Support (Sped) English 12

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

[← Previous](#)
 Cancel
 **Continue** →

**Step 24:** Click **Add** to add *Instruction* services.

Post-Secondary Transition Services			
None	Services		
	INSTRUCTION ( + Add)		
	Actions	Service	Provider Agency and Position
<input type="checkbox"/>	No Records Found		



**Step 25:** Enter the *Instruction Secondary Transition Information*.

**INSTRUCTION** (e.g., tutoring, skills training, prep for college entrance exam, accommodations, adult basic ed.):

a. Tour Basketball coaching clinics  
 b. Develop a monthly living budget  
 c. Auto CAD / computer programming class  
 (If none, indicate "none")

**Step 26:** Select the related goals to this transition service.

Relate this transition service to one or more of the Secondary Transition Outcomes/Goals that you defined earlier.

Secondary Transition Outcomes/Goals		
Include	Category	Outcome/Goal
<input checked="" type="checkbox"/>	Employment	Upon completion of high school, McKenzie will work part time for YMCA Intramural Program as an Assistant to the Head Basketball Coach by 20XX and part time as a construction trainee.
<input type="checkbox"/>	Education	Upon completion of high school, McKenzie will enroll full time at Parkland Community College in classes related to Sports Training and Management, and Construction Management by 20XX.
<input checked="" type="checkbox"/>	Training	Upon completion of high school, McKenzie will be participate annually in Coach Ray's Summer Coaches Clinic at University of Quality by 20XX and also apprentice with his uncle in the construction field.
<input type="checkbox"/>	Independent Living	Upon completion of high school, McKenzie will be able to maintain a personal finance budget. Upon completion of high school, McKenzie will maintain a professional manner when in the workplace.

**Step 27:** Enter the *Provider Agency and Position*.

Provider Agency and Position: Case Manager

**Step 28:** Enter the *Date to be Addressed* and *Date Completed*.

Date to be Addressed:  MM/DD/YYYY

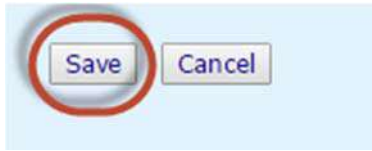
Date Completed:  MM/DD/YYYY

**Step 29:** To have goals appear in this grid, you will need to create a new and/or modify the *Goals and Objective* form.

The transition services and the goals are associated automatically from the Goals and Objectives Form. To have goals appear in this grid you will need to create a new or modify an existing 3744m - Goals and Objective form.

Associated Goals	
Goal Number	Goal Statement
No goals are associated with this transition service.	

**Step 30:** When complete, click **Save**.



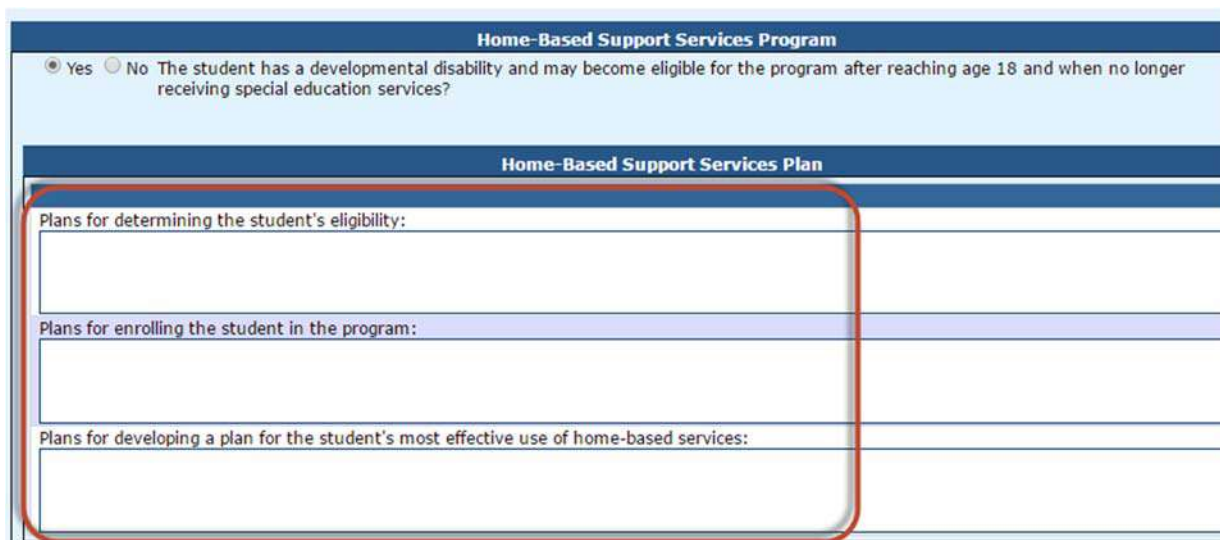
**Step 31:** Repeat steps 24-30 for Related Services, Community Experiences, Development of Employment and Other Post-School Adult Living Objectives, Appropriate Acquisition of Daily Living Skills and/or Functional Vocational Evaluation, and Linkages to After Graduation Supports/Services. When complete, click **Continue**.



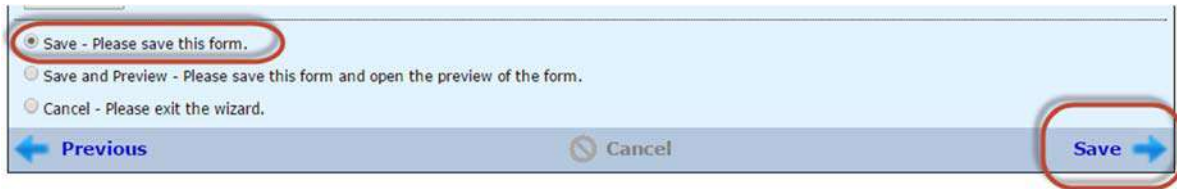
**Step 32:** Answer the *Home-Based Support Services Program* questions by clicking **Yes** or **No**.



**Step 33:** If **Yes** is selected, enter the *Home-Based Support Service Plan*.



**Step 34:** When complete, click **Save**.



The screenshot shows a wizard interface with a light blue header and a darker blue footer. In the header, there are three radio button options: "Save - Please save this form." (selected), "Save and Preview - Please save this form and open the preview of the form.", and "Cancel - Please exit the wizard." The "Save" option is circled in red. In the footer, there are three buttons: "Previous" with a left arrow, "Cancel" with a crossed-out circle, and "Save" with a right arrow. The "Save" button is also circled in red.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save →](#)

# Functional Behavioral Assessment

**Step 1:** From the *IEP Forms* tab, select the **Functional Behavioral Assessment** form.

The screenshot shows a web interface with a tabbed menu at the top: "IEP Forms", "Notice and Consent Forms", "Eligibility Forms", and "Other Forms". The "IEP Forms" tab is active, displaying a table titled "Select the Form". The table has three columns: "Started", "IEP Forms", and "Name". The "Functional Behavioral Assessment" row is highlighted with a red box.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	<b>Functional Behavioral Assessment</b>	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** You must assign this documentation to a meeting by either creating a new meeting or assigning it to an existing meeting. To extend the search criteria, click the drop-down list below.

The screenshot shows a web interface with a tabbed menu at the top: "IEP Forms", "Notice and Consent Forms", "Eligibility Forms", and "Other Forms". The "IEP Forms" tab is active, displaying a table titled "Select a meeting (+ Add)". The table has three columns: "Select", "First Meeting Date", and "Subject". The "1 Week" dropdown menu is highlighted with a red box.

Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than **1 Week** old

**Step 2a:** This will populate the past meetings. To select a past meeting, click the button located under the *Select* column.

The screenshot shows a web interface with a tabbed menu at the top: "IEP Forms", "Notice and Consent Forms", "Eligibility Forms", and "Other Forms". The "IEP Forms" tab is active, displaying a table titled "Select a meeting (+ Add)". The table has three columns: "Select", "First Meeting Date", and "Subject". The "Select" column button is highlighted with a red box.

Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than **1 Week** old

**Step 3:** If you are creating a new meeting, click **Add**.

Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than  old

**Step 3a:** To set up a conference, click **Create an IEP** and follow steps 5-33.

Form Date: / - MM/DD/YYYY

Select	Purpose
<input type="checkbox"/>	<b>Review of Existing Data</b> - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
<input checked="" type="checkbox"/>	<b>Initial Evaluation/Eligibility</b> - Review your child's recent evaluation to determine initial eligibility for special education and related services.
<input type="checkbox"/>	<b>Reevaluation</b> - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
<input type="checkbox"/>	<b>Initial IEP</b> - Review your child's need for special education and related services and placement and develop an initial IEP.
<input type="checkbox"/>	<b>IEP Review and Revision</b> - Review and/or revise your child's IEP to determine special education and related services and placement.
<input type="checkbox"/>	<b>Secondary Transition</b> - Consider postsecondary goals and transition services (beginning at age 14 1/2).
<input type="checkbox"/>	<b>FBA/BIP</b> - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
<input type="checkbox"/>	<b>MDR</b> - Consider relatedness of your child's disability to a disciplinary code violation(s).
<input type="checkbox"/>	<b>Graduation</b> - Review your child's anticipated date of graduation.
<input type="checkbox"/>	<b>Other</b> - (e.g. Termination of Placement, Aging Out) :

**Step 4:** Once a meeting has been selected, click **Continue**.

[Click Here to Add meeting notes](#)

Select	First Meeting Date	Subject
<input checked="" type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than  old

**Continue - Please continue the wizard.**

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

**Step 5:** Enter the *Student's Strengths*.

Functional Behavioral Assessment
Remarks
<b>Student's Strengths</b> - Include a description of behavioral strengths (e.g., ignores inappropriate behavior of peers, positive interactions with staff, accepts responsibility, etc.) McKenzie is an imaginative student; whose writing possess many good ideas and interest facts. McKenzie's parents report that he is responsible at home and he often completes his chores, takes care of her sibling, and reads picture books to her younger sisters. Socially, McKenzie has many friends and she likes talk to adults. McKenzie participates in extracurricular activities and she is an athletic student. McKenzie especially enjoys her physical education class. McKenzie is well liked by peers and engages in discussion with trusted adults. She likes to participate in class discussion and is generally attentive.

**Step 6:** Enter the *Operational Definition of Target Behavior*.

Operational Definition of Target Behavior
- Include a description of the frequency, duration and intensity of the behavior. Enter text here. (test1)

**Step 7:** Enter the *Setting*.

Setting
- Include a description of the setting in which the behavior occurs (e.g., physical setting, time of day, persons involved.) Enter Text Here

**Step 8:** Enter the *Antecedents*.

Antecedents
- Include a description of the relevant events that preceded the target behavior. Enter Text Here

**Step 9:** Enter the *Consequences*.

Consequences
- Include a description of the result of the target behavior (e.g. removed from classroom and did not complete assignment. What is the payoff for the student?) Enter Text Here

**Step 10:** Enter the *Environmental Variables*.

Environmental Variables
- Include a description of any environmental variables that may affect the behavior (e.g., medication, weather, diet, sleep, social factors.) Enter Text Here

**Step 11:** Enter the *Hypothesis of Behavioral Function*.

Hypothesis of Behavioral Function
- Include a hypothesis of the relationship between the behavior and the environment in which it occurs. Enter Text Here

**Step 12:** When complete, click **Save**.

The image shows a wizard interface with a light blue background. At the top, there are three radio button options: "Save - Please save this form." (which is selected and circled in red), "Save and Preview - Please save this form and open the preview of the form.", and "Cancel - Please exit the wizard." Below these options is a dark blue navigation bar. On the left, there is a blue arrow pointing left and the text "Previous". In the center, there is a greyed-out "Cancel" button with a prohibition icon. On the right, there is a "Save Now" button with a floppy disk icon, and a "Save" button with a blue arrow pointing right, which is circled in red.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Save →](#)

# Behavioral Intervention Plan

**Step 1:** Under the *IEP Forms* tab, select **Behavioral Intervention Plan**.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	<b>Behavioral Intervention Plan</b>	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

NOTE: If you would like to populate information from the previous FBA or BIP click **Load Previous FBA Form Details** or **Load Previous BIP Form Details**.

**Target Behavior**

[Load Previous FBA Form Details.](#)  
[Load Previous BIP Form Details.](#)

This behavior was caused by:

Skill Deficit  
 Performance Deficit

**Skill Deficit:** The student does not know how to perform the desired behavior.  
**Performance Deficit:** The student knows how to perform the desired behavior, but does not consistently do so.

**Step 2:** Select the *Target Behavior*.

**Target Behavior**

This behavior was caused by:

Skill Deficit  
 Performance Deficit

**Skill Deficit:** The student does not know how to perform the desired behavior.  
**Performance Deficit:** The student knows how to perform the desired behavior, but does not consistently do so.



**Step 3:** Enter the *Student's Strengths*.

Behavioral Intervention Plan (As Appropriate)	
	Remarks
<b>Student's Strengths</b> - Describe student's behavioral strengths	
McKenzie is an imaginative student, whose writings possess many good ideas and interesting facts. McKenzie's parents report that he is responsible at home and he often completes his chores, takes care of his siblings, and reads picture books to his younger sisters. Socially, McKenzie has many friends and he likes talking to adults. McKenzie participates in extracurricular activities and he is an athletic student. McKenzie especially enjoys his physical education class. McKenzie is well liked by peers and engages in discussions with trusted adults. She likes to participate in class discussions and is generally attentive during lectures and class presentations	

**Step 4:** Enter the *Hypothesis of Behavioral Function*.

<b>Hypothesis of Behavioral Function</b> - Include hypothesis developed through the Functional Behavioral Assessment (attach completed form). What desired thing(s) is the student trying to get? OR What undesired thing(s) is the student trying to avoid?
See the <b>FBA</b> for more specific information on each of these behaviors 1) Elevated physical and vocal comments 2) Inappropriate comments 3) Aggressive arguments with teachers
To escape academic tasks that are above his ability level, McKenzie will exhibit behaviors 1, 2 and 3. To gain attention from peers, McKenzie will exhibit behaviors 2 and 3. To gain attention from teachers and staff, McKenzie will exhibit behaviors 1 and 2: To maintain command of the situation and not appear "stupid" in front of peers, McKenzie will exhibit behaviors 2 and 3.

**Step 5:** Enter the *Summary of Previous Interventions Attempted*.

<b>Summary of Previous Interventions Attempted</b> - Describe any environmental changes made, evaluations conducted, instructional strategy of curriculum changes made or replacement behaviors taught.
Throughout McKenzie's academic career, he has been involved with several attempted interventions. • McKenzie was given a help card to use that he would flip when he needed assistance. This system was unsuccessful because other students asked what the card was for and McKenzie immediately felt singled out and refused to continue with it. Also, teachers did not always notice the card right away, providing time for behaviors to occur. • McKenzie was moved from a general education reading class to an instructional reading class, where his behaviors have decreased from those seen in the general education reading class. • At the present time, McKenzie is working with his case manager on engaging in appropriate conversations with teachers and staff, effectively dealing with frustration, and appropriately asking for attention and help with assignments.

**Step 6:** Enter the *Replacement Behaviors*.

<b>Replacement Behaviors</b> - Describe which new behaviors or skills will be taught to meet the identified function of the target behavior (e.g. student will slap his desk to replace striking out at others). Include description of how these behaviors/skills will be taught.
McKenzie will be taught in his resource class appropriate ways of asking for help and dealing with academic frustration in the classroom setting that will not result in embarrassment around peers, as McKenzie is very aware of peer acceptance. In addition to reinforcement plans (see next page) primary instructional methods will be teacher modeling and prompting of appropriate responses. In addition, McKenzie will begin attending the school counselor's anger management group. The sessions will deal directly with how to respond, without anger or escalating the situation, to teacher redirection or prompts to begin working and techniques that he can use to diffuse his own anger. 1) Elevated physical and vocal comments - replaced with appropriate ways to ask for assistance with academic tasks and more appropriate ways to relieve stress/anxiety in a classroom setting. 2) Inappropriate comments - replaced with appropriate ways to ask for assistance with academic tasks 3) Aggressive arguments with teachers - replaced with appropriate ways to ask for assistance with academic tasks, specific, more respectful phrases to use with adults when anger is escalating, and techniques for dealing with escalating anger and feelings of frustration that help to de-escalate the anger.

**Step 7:** When complete, click **Continue**.

<input checked="" type="radio"/> Continue - Please continue the wizard.
<input type="radio"/> Save and Exit - Please save this form and exit the wizard.
<input type="radio"/> Cancel - Please exit the wizard.
A row of navigation buttons: a blue arrow pointing left labeled 'Previous', a grey circle with a diagonal slash labeled 'Cancel', a blue document icon labeled 'Save Now', and a blue arrow pointing right labeled 'Continue'.

NOTE: If you would like to load previous BIP information, click **Load Previous BIP Form Details**.

Behavioral Intervention Plan (As Appropriate)	
<a href="#">Load Previous BIP Form Details.</a>	
Remarks	
<b>Environment</b>	How can the environment or circumstances that trigger the target behavior be adjusted?

**Step 8:** Enter the *Environment*.

Behavioral Intervention Plan (As Appropriate)	
Remarks	
<b>Environment</b>	How can the environment or circumstances that trigger the target behavior be adjusted?
McKenzie's environment is crucial to his success.	
<input type="checkbox"/> She should be moved closer to the teacher and away from distractions.	
<input type="checkbox"/> She should have immediate access to calculators and any academic tool necessary for his success (see supplementary aids section of	

**Step 9:** Enter the *Instruction and/or Curriculum*.

Instruction and/or Curriculum	
<b>Instruction and/or Curriculum</b>	What changes in instructional strategies or curriculum would be helpful?
McKenzie's behaviors may reflect some problems with instructional strategies.	
<input type="checkbox"/> Non-structured time period should be avoided or limited.	
<input type="checkbox"/> The teacher should develop a strategy to acknowledge McKenzie during times of confusion or frustration so that he is not reprimanded publicly.	

**Step 10:** Describe all *Positive Supports*.

Positive Supports	
<b>Positive Supports</b>	Describe all additional services or supports needed to address the student's identified needs that contribute to the target behavior.
McKenzie's case manager, academic instructors, counselors, and parents must work together to ensure his success.	
<input type="checkbox"/> The case manager must monitor Diego's progress and attend to instruction on appropriate ways to deal with academic frustration and his adherence to the behavior plan.	

**Step 11:** Describe the *Motivators and/or Rewards*.

Motivators and/or Rewards	
<b>Motivators and/or Rewards</b>	Describe how the student will be reinforced to ensure that replacement behaviors are more motivating than the target behavior.
<input type="checkbox"/> Teachers should use consistent verbal reinforcement for appropriate behaviors.	
<input type="checkbox"/> Positive phone calls or letters will be sent home in response to appropriate behavior displayed on a continual basis.	
Diego will be placed on a token reward management system to reinforce the behaviors being taught in his resource setting and anger management	

**Step 12:** Describe the *Restrictive Disciplinary Measures*.

Restrictive Disciplinary Measures	
<b>Restrictive Disciplinary Measures</b>	Describe any restrictive disciplinary measures that may be used with the student and any conditions under which such measures may be used (include necessary documentation and timeline for evaluation.)
The following restrictions will be documented by teachers on his daily behavior chart and given to his case manager daily, who will chart them weekly.	
<input type="checkbox"/> The teacher will redirect and specifically identify McKenzie's behavior.	
<input type="checkbox"/> The teacher will reduce McKenzie's self-management points and discuss the reasoning behind the reduction.	

**Step 13:** Describe the *Crisis Plan*.

Crisis Plan	
<b>Crisis Plan</b>	Describe how an emergency situation or behavior crisis will be handled.
If McKenzie's behaviors escalate quickly, and it becomes a crisis situation, the following steps should be taken:	
1) McKenzie should be removed from the situation.	
2) During this time, McKenzie should be given a chance to cool-off. While, McKenzie is cooling-off, he should be in the company of a trusted adult.	

**Step 14:** Describe the *Data Collection Procedures and Methods*.

**Data Collection Procedures and Methods** Describe expected outcomes of the interventions, how data will be collected and measured, timelines for and criteria to determine success or lack of success of the interventions.

Desired outcomes and criteria for success include:

a She will learn how to utilize the raise-and-wait procedure, respond to teacher direction, ask for assistance, and comply with teacher request. These behaviors will become mastered based on a compliance rate of 80% (8 times out of 10). As a result:

**Step 15:** Describe the *Provisions for Coordination with Caregivers*.

**Provisions for Coordination with Caregivers** Describe how the school will work with the caregivers to share information, provide training to caregivers if needed, and how often this communication will take place.

McKenzie's grandparents should be involved with every step of the intervention. During this meeting, McKenzie's grandparents assisted in creating the self management checklist and token reinforcers.

- 1) The case manager is responsible for the majority of communication between the school and grandparents.
- 2) The case manager will distribute this plan to all teachers and administrators directly involved with McKenzie.
- 3) All of McKenzie's teachers will be trained on the self-management procedures.

**Step 16:** To save the form, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Save →](#)

# Goals and Objectives

**Step 1:** Under the *IEP Forms* tab, select the **Goals and Objectives** form.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	<b>Goals and Objectives</b>	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Click **Add** to add *Goals and Objectives/Benchmark(s)*.

Goals and Objectives / Benchmarks (+ Add)

**Step 3:** Type in the text box the *Goal Area* and *Goal Statement*.

**Goal Details**

Goal Area: Reading

Goal Statement: Given sixth-grade class reading materials, and using age-appropriate strategies, she will answer 10 comprehension questions (literal and inferential) about the given text with 90%- 100% accuracy. By the end of the year, read and comprehend literary nonfiction in the grade 6-8 text complexity band proficiently, with scaffolding and needed at the high end of the range. |

**Step 4:** Select the *Learning Standard Type*.

**Learning Standard Type**

Common Core State Standard (Math and English Language Arts)

Illinois Learning Standard

Other (Transition Only)

Standard #: RI.7.10

**Step 5:** Select the desired *Goal Area*.

**Goal Area**

Academic  Functional  Other (Transition Only)  
 Transition  ESY

**Step 6:** You can import the text from the *Academic Achievement of Present Levels* form to prepopulate in the *Current Academic Achievement and Function Performance* box by selecting the checkbox, and click **Import This Text**.

**Academic Achievement Present Levels**

Select the text you would like to import into the Current Academic Achievement and Functional Performance section for this goal. Press the "Import This Text" button and selected text will appear in the box below. You may then edit or type in any additional information.

Selected	Area	Description
<input checked="" type="checkbox"/>	Reading	Mckenzie comprehends best when text is read to her. She averages 8 out of 10 correct answers on weekly reading probes ( which consist of story and informative text at the 6th and 7th grade level of 2-3 paragraphs length chosen by his teacher ) when the text is read to him, compared to 5 out of 10 correct when he reads independently. When required to read independently, his difficulty with decoding ( reading the words on the page ), interferes with his comprehension. He relies heavily on sight word vocabulary ( words he knows by heart and does not need to sound out). Testing shows: * On an assessment of the letter and letter-pair sounds that Mckenzie knows, Mckenzie had difficult blending ( putting sounds together such as "s" and "t" in "Start") and chunking ( separating words into their individual sounds - "p-l-a-n-t" is five sounds. Brinlyn often says "pl-a-nt" - three sounds). While he knows most of the basic one letter phonemes ( b,c,d,, etc- missed x,q, and added "uh" to the end of many), he does not know most of the multi-letter phonemes or those for vowels (ie, ough, igh, ai, ph, etc...) * He currently reads grade level reading passages at an average rate of 100 words correct per minute, as assessed using the DIBELS program. * On the most recent yearly state standardized test of academic progress, Mckenzie scored 9 out of 24 correct in reading comprehension.

Please note that importing this text will replace all text currently in the Current Academic Achievement and Functional Performance text box.

**Import This Text**

**Current Academic Achievement and Functional Performance**

**Step 7:** The *Current Academic Achievement and Functional Performance* text box will be complete OR you can edit the text box if you do not want this to prepopulate.

**Current Academic Achievement and Functional Performance**

Academic Achievement:  
Reading: Mckenzie comprehends best when text is read to her. She averages 8 out of 10 correct answers on weekly reading probes ( which consist of story and informative text at the 6th and 7th grade level of 2-3 paragraphs length chosen by his teacher ) when the text is read to him, compared to 5 out of 10 correct when he reads independently. When required to read independently, his difficulty with decoding ( reading the words on the page ), interferes with his comprehension. He relies

**Step 8:** Click **Add** to add *Title(s) of Goal Implementer(s)*.

**Title(s) of Goal Implementer(s) (+ Add)**

**Step 9:** Select the *Title* from the drop-down box and click **Save**.

**Goals and Objectives** Step 2 of 2

You may add, edit and delete multiple goals using this wizard. You will be able to setup the objects for each goal after you create the goals. [Help](#) ■

Title:

**Step 10:** Select the desired *Reporting Method*.

Reporting on Goals	
Relevant	Reporting Method
<input checked="" type="checkbox"/>	Report Card
<input checked="" type="checkbox"/>	Progress Reports
<input type="checkbox"/>	Parent Conference
<input checked="" type="checkbox"/>	Phone Call/ Email
	Other (specify) <input type="text"/>

**Step 11:** When complete, click **Save**.

Reporting on Goals	
Relevant	Reporting Method
<input checked="" type="checkbox"/>	Report Card
<input checked="" type="checkbox"/>	Progress Reports
<input type="checkbox"/>	Parent Conference
<input checked="" type="checkbox"/>	Phone Call/ Email
	Other (specify) <input type="text"/>

**Step 12:** To add *Short-Term Objectives/Benchmarks*, click **Modify**.

Goals and Objectives / Benchmarks (+ Add)					
Edit	Delete	Move Up / Down	Goal Number-Designation	Goal Statement	Objectives
			1 - Reading	Given sixth-grade class reading materials, and using age-appropriate strategies, McKenzie will answer 10 comprehension questions ( literal and inferential) about the given text with 90%- 100% accuracy. By the end of the year, read and comprehend literary nonfiction in the grades 6-8 text complexity band proficiently, with scaffolding and needed at the high end of the range.	<p><b>Short-Term Objectives / Benchmarks</b> </p> <p><b>Objective</b></p> <p>No Records Found</p>

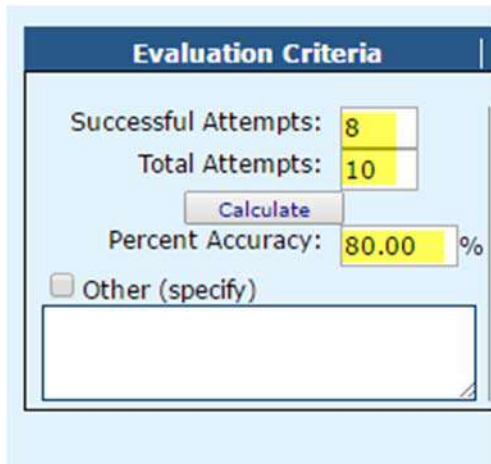
**Step 13:** Click **Add**.

Short-Term Objectives/Benchmarks (+ Add)			
Edit	Delete	Move Up / Down	Objective
No Records Found			

**Step 14:** Type the *Short-Term Objective/Benchmark* in the text box.

Short-Term Objectives/Benchmarks			
Edit	Delete	Move Up / Down	Objective
No Records Found			
Goal Statement			
Given sixth-grade class reading materials, and using age-appropriate strategies, McKenzie will answer 10 comprehension questions ( literal and inferential) about the given text with 90%- 100% accuracy. By the end of the year, read and comprehend literary nonfiction in the grades 6-8 text complexity band proficiently, with scaffolding and needed at the high end of the range.			
Short-Term Objective/Benchmark			
By April 15, given a 5th grade reading passage and 10 literal comprehension questions, McKenzie will use the Word Identification Strategy and Paraphrasing Strategy (RAP- Read, Asking-" What are the main ideas, Put the ideas in your own words.) to answer 80-100% of the questions correctly across 3 trails			

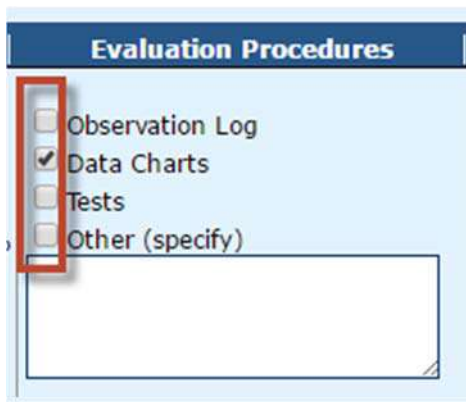
**Step 15:** Enter the *Evaluation Criteria*.



The screenshot shows a form titled "Evaluation Criteria" with a blue header. It contains the following fields and controls:

- Successful Attempts: 8
- Total Attempts: 10
- Calculate button
- Percent Accuracy: 80.00 %
- Other (specify)
- A text input box for specifying other criteria.

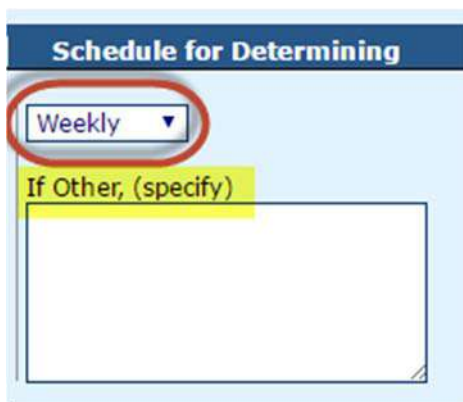
**Step 16:** Select the *Evaluation Procedures*.



The screenshot shows a form titled "Evaluation Procedures" with a blue header. It contains the following controls:

- Observation Log
- Data Charts
- Tests
- Other (specify)
- A text input box for specifying other procedures.

**Step 17:** From the drop-down select the *Schedule for Determining*.



The screenshot shows a form titled "Schedule for Determining" with a blue header. It contains the following controls:

- A drop-down menu with "Weekly" selected.
- If Other, (specify)**
- A text input box for specifying other schedules.



**Step 18:** When complete, click **Save**.

Evaluation Criteria	Evaluation Procedures	Schedule for Determining
Successful Attempts: <input type="text" value="0"/> Total Attempts: <input type="text" value="0"/> <input type="button" value="Calculate"/> Percent Accuracy: <input type="text" value="NaN"/> % <input type="checkbox"/> Other (specify) <input type="text"/>	<input type="checkbox"/> Observation Log <input checked="" type="checkbox"/> Data Charts <input type="checkbox"/> Tests <input type="checkbox"/> Other (specify) <input type="text"/>	<input type="text" value="Weekly"/> If Other, (specify) <input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

**Step 19:** When complete adding *Short-Term Objectives/Benchmarks*, click **Return to Goals**.

Short-Term Objectives/Benchmarks ( <input )<="" th="" type="button" value="+ Add"/>			
Edit	Delete	Move Up / Down	Objective
<input type="button" value="✎"/>	<input type="button" value="✖"/>	<input type="button" value="▲"/> <input type="button" value="▼"/>	By April 15, given a 5th grade reading passage and 10 literal comprehension questions, Mckenzie will use the Word Identification Strategy and Paraphrasing Strategy (RAP- Read, Asking-" What are the main ideas, Put the ideas in your own words.) to answer 80-100% of the questions correctly across 3 trails.
<input type="button" value="Cancel"/> <input type="button" value="Return to Goals"/> <input type="button" value="➔"/>			

**Step 20:** When complete adding all *Goals and Objectives/Benchmarks*, click **Save**.

[Click Here to Add meeting notes](#)

Goals and Objectives / Benchmarks (✖ Modify)					
Edit	Delete	Move Up / Down	Goal Number-Area	Goal Statement	Objectives
			1 - Reading	Given sixth-grade class reading materials, and using age-appropriate strategies, she will answer 10 comprehension questions (literal and inferential) about the given text with 90%-100% accuracy. By the end of the year, read and comprehend literary nonfiction in the grade 6-8 text complexity band proficiently, with scaffolding and needed at the high end of the range.	<p>Short-Term Objectives / Benchmarks (✖ Add/Modify)</p> <p><b>Objective</b></p> <p>By April 15, given a 5th grade reading passage and 10 literal comprehension questions. She will use the the word Identification Strategy and Paraphrasing Strategy (REP- Read, Asking-" What are the main ideas/put ideas in your own words.") to answer 80-100% of the questions correctly across 3 trails.</p>

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

[← Previous](#)
 Cancel
**Save** →

**Step 21:** The *Goals and Objectives* form will be added to the meeting as a draft under the *IEP Timeline* tab.

<p> <a href="#">Edit Form</a> </p> <p> <a href="#">Make Form Official</a> </p> <p> <a href="#">Print Form</a> </p> <p> <a href="#">Form Activity Log</a> </p> <p> <a href="#">Delete Form</a> </p>	<p>Form: <b>Form 34-54M: Goals and Objectives</b></p> <p>Date: <b>04/26/2018</b></p> <p>Status: <b>Draft</b></p> <p>Update Info: <b>Gray, Train09Olivia - 4/26/2018 2:40:44 PM</b></p>
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# Progress Annual Goals Option 1

NOTE: Progress Reports will become available AFTER the *Goals and Objectives* Form has been made OFFICIAL.

<a href="#">Edit Form</a>	Form: Form 37-44m: <b>Goals and Objectives</b>
<b>Make Form Official</b>	Date: <b>04/19/2017</b>
<a href="#">Print Form</a>	Status: <b>Draft</b>
<a href="#">Form Activity Log</a>	Update Info: <b>Schmitt, Kenzie - 4/20/2017 11:38:25 AM</b>
<a href="#">Delete Form</a>	

**Step 1:** After selecting *Make Form Official*, the **Goals and Objectives** form will go through an error check.

NOTE: The check-mark will indicate the form has passed the error check.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/19/2017	Form 37-44m	Goals and Objectives

[Print Errors](#) [Change Status](#)

NOTE: A red icon will indicate there are errors. All errors need to be corrected before the form can be made official. The error description will also be listed.



**Step 2:** Once the form has passed the error checking, you may select the form to be updated to official status.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/19/2017	Form 37-44m	Goals and Objectives

**Step 3:** Click **Change Status**.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/19/2017	Form 37-44m	Goals and Objectives

**Step 4:** Enter the *Official Start Date* for this IEP.

**Please Enter the Official Start Date for this IEP**

Start Date:  \*MM/DD/YYYY

**Step 5:** Click **Save**.

**Step 6:** This will bring you back to the *IEP Timeline*, where you will now have the option to add progress report(s).

NOTE: The IEP status for the IEP becomes official once the IEP gets a start date.

Print Form

Form Activity Log

Add progress report (Option 1)

Add progress report (Option 2: Data Chart)

Form: Form 37-44m: **Goals and Objectives**

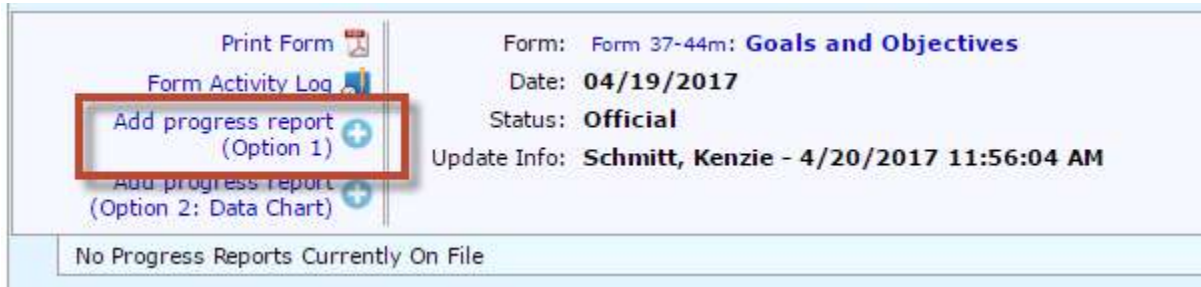
Date: **04/19/2017**





Status: **Official**

Update Info: **Schmitt, Kenzie - 4/20/2017 11:56:04 AM**

No Progress Reports Currently On File

**Step 7:** Click **Add progress report (Option 1)**.

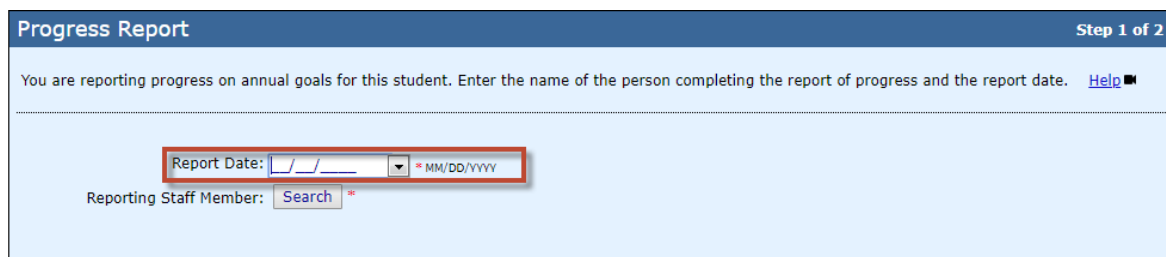


Print Form   
Form Activity Log   
**Add progress report (Option 1)**   
Add progress report (Option 2: Data Chart) 


Form: Form 37-44m: **Goals and Objectives**  
Date: **04/19/2017**  
Status: **Official**  
Update Info: **Schmitt, Kenzie - 4/20/2017 11:56:04 AM**

No Progress Reports Currently On File

**Step 8:** Enter the **Report Date**.



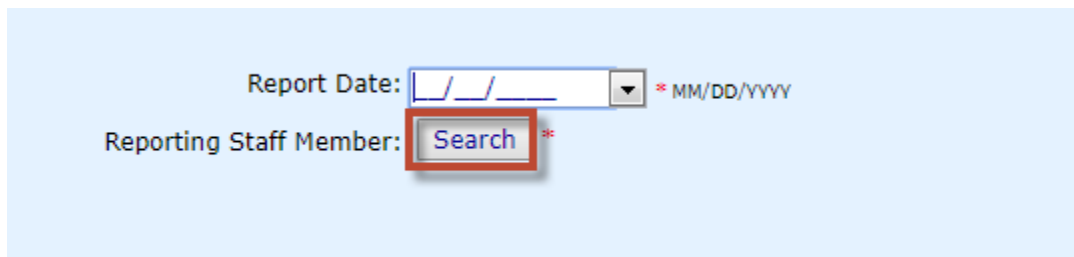
**Progress Report** Step 1 of 2

You are reporting progress on annual goals for this student. Enter the name of the person completing the report of progress and the report date. [Help](#) 

Report Date:  \* MM/DD/YYYY

Reporting Staff Member:  \*

**Step 9:** Click **Search** to enter the name of the person completing the report.



Report Date:  \* MM/DD/YYYY

Reporting Staff Member:  \*

**Step 9a:** Search for the personnel completing the report by *First Name, Last Name, and Gender, or IEIN.*

**Progress Report** Step 1 of 2

You are reporting progress on annual goals for this student. Enter the name of the person completing the report of progress and the report date.

**Personnel Search**

<b>Multiple</b>	OR	<b>Single</b>
District: Jasper County CUD 1		IEIN: <input type="text"/>
Last Name: <input type="text"/>		
First Name: <input type="text"/>		
Gender: <input type="text"/>		
Include Retired <input type="checkbox"/>		
<input type="button" value="Search"/> <input type="button" value="Clear Search"/> <input type="button" value="Cancel"/>		

Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

**Step 9b:** To select personnel in the search results, click the **check-mark**.

**Personnel Search**

<b>Multiple</b>	OR	<b>Single</b>
District: Jasper County CUD 1		IEIN: <input type="text"/>
Last Name: Schmitt		
First Name: <input type="text"/>		
Gender: <input type="text"/>		
Include Retired <input type="checkbox"/>		
<input type="button" value="Search"/> <input type="button" value="Clear Search"/> <input type="button" value="Cancel"/>		

Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

**Personnel Search Results**

Select	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input checked="" type="checkbox"/>	██████	Mackenzie Schmitt					

**Step 9c:** Enter the *Title* of the reporting staff member and click **Modify**.

Title:  \*

**Title**

LEA Representative

**Step 9d:** Click **Add**.

When are you finished setting up the titles click Return.

Title(s) for **Mackenzie Schmitt**

Titles (+ Add)	
Title	No Records Found

**Step 9e:** Select the personnel *Title* from the drop-down.

Select the new title and click the Save button.

Title:

**Step 9f:** Click **Save**.

Select the new title and click the Save button.

Title:

**Step 9g:** When complete, click **Return**.

Title(s) for **Mackenzie Schmitt**

Titles (+ Add)		
Edit	Delete	Title
		Special Education Teacher

**Step 10:** Click **Continue**.

The screenshot shows the 'Progress Report' interface, Step 1 of 2. The header includes the title 'Progress Report' and 'Step 1 of 2'. Below the header, there is a text prompt: 'You are reporting progress on annual goals for this student. Enter the name of the person completing the report of progress and the report date.' The form contains several fields: 'Report Date' with a dropdown menu showing '04/20/2017' and a format indicator 'MM/DD/YYYY'; 'Reporting Staff Member' with the text 'Mackenzie Schmitt' and a 'Search' button; 'Title' with a dropdown menu showing 'Special Education Teacher' and a 'Titles (X Modify)' link. At the bottom left, there is a 'Show Audit Trail' checkbox. At the bottom center, there is a 'Cancel' button. At the bottom right, there is a 'Continue' button with a right-pointing arrow. Two red circles highlight the 'Continue - Please continue the wizard.' radio button and the 'Continue' button.

**Step 11:** Select how the student is progressing toward meeting his/her goal.

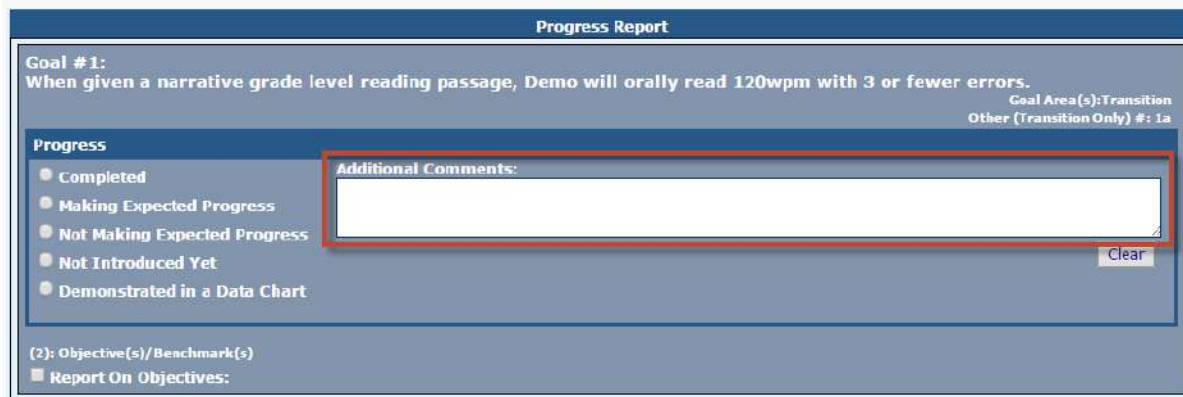
NOTE: You can report on the goals or the objectives, but you must specify your reporting option for each goal statement.

**Step 12:** If you would like to report on goals, select the student's progress.

The screenshot shows the 'Progress Report' interface for a specific goal. The header is 'Progress Report'. Below the header, there is a 'Goal #1:' section with the text: 'When given a narrative grade level reading passage, Demo will orally read 120wpm with 3 or fewer errors.' To the right of this text, it says 'Goal Area(s): Transition' and 'Other (Transition Only) #: 1a'. Below the goal text, there is a 'Progress' section with a list of radio buttons: 'Completed', 'Making Expected Progress', 'Not Making Expected Progress', 'Not Introduced Yet', and 'Demonstrated in a Data Chart'. The 'Completed' option is selected. To the right of the progress options, there is an 'Additional Comments:' section with a text input field and a 'Clear' button. At the bottom left, there is a '(2): Objective(s)/Benchmark(s)' section with a 'Report On Objectives:' checkbox.

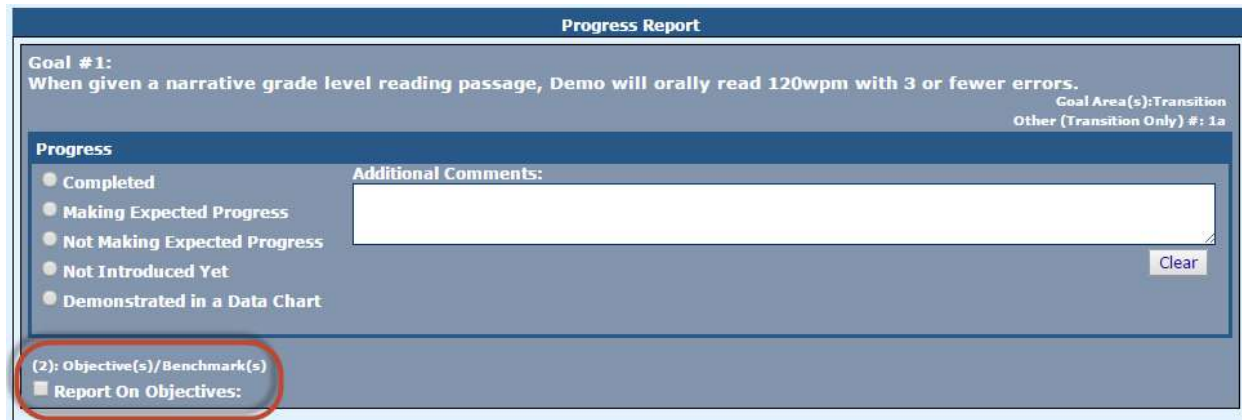


**Step 12a:** If you would like to add *Additional Comments*, you can do so here.



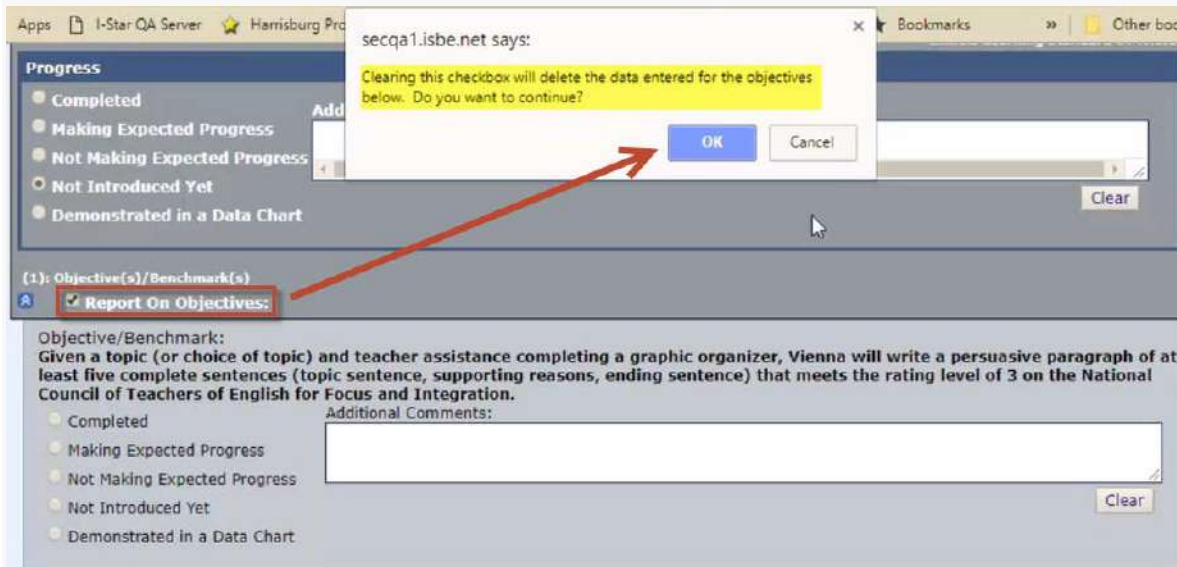
The screenshot shows a "Progress Report" form. At the top, it says "Progress Report". Below that, "Goal #1: When given a narrative grade level reading passage, Demo will orally read 120wpm with 3 or fewer errors." To the right of the goal, it says "Goal Area(s): Transition" and "Other (Transition Only) #: 1a". Under the "Progress" section, there are five radio button options: "Completed", "Making Expected Progress", "Not Making Expected Progress", "Not Introduced Yet", and "Demonstrated in a Data Chart". To the right of these options is a text area labeled "Additional Comments:" with a "Clear" button. A red box highlights the "Additional Comments:" text area. At the bottom left, there is a section labeled "(2): Objective(s)/Benchmark(s)" with a checkbox labeled "Report On Objectives:".

**Step 13:** Check the box if you would like to report on the **Objective(s)/Benchmark(s)**.

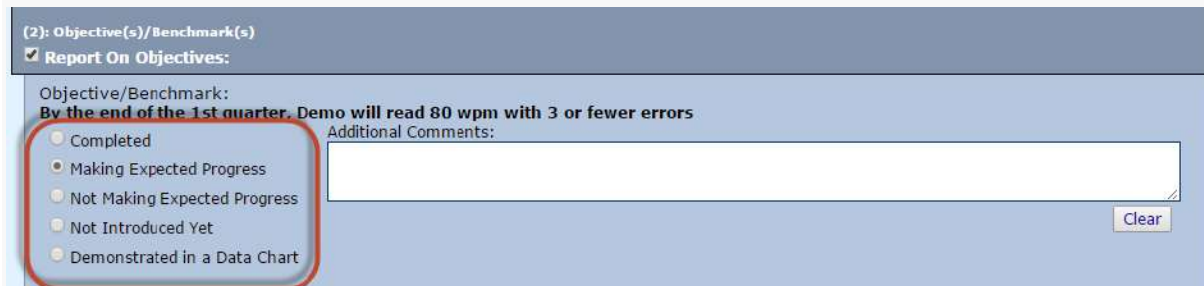


This screenshot is identical to the one above, but with a red box highlighting the "(2): Objective(s)/Benchmark(s)" label and the "Report On Objectives:" checkbox. The "Additional Comments:" field is still highlighted with a red box.

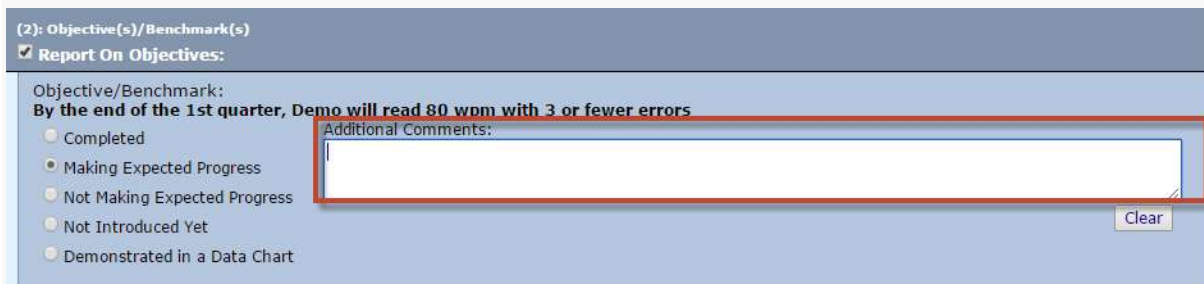
NOTE: This should only be unchecked if you wish to NOT report on Objectives.



**Step 13a:** Select the student's progress toward the *Objective(s)/Benchmark(s)*.



**Step 13b:** If you would like to add *Additional Comments*, you can do so here.



**Step 14:** When complete, **Save** the form.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Save →](#)

## Progress Annual Goals Option 2 (Data Chart)

NOTE: Progress Reports will become available AFTER the *Goals and Objective* form has been made OFFICIAL.

<a href="#">Edit Form</a>	Form: Form 37-44m: <b>Goals and Objectives</b>
<b>Make Form Official</b> 	Date: <b>04/19/2017</b>
<a href="#">Print Form</a>	Status: <b>Draft</b>
<a href="#">Form Activity Log</a>	Update Info: <b>Schmitt, Kenzie - 4/20/2017 11:38:25 AM</b>
<a href="#">Delete Form</a> 	

**Step 1:** After selecting *Make Form Official*, the *Goals and Objective* form will go through an error check.

NOTE: The check-mark will indicate the form has passed the error check.


Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
 (0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/19/2017	Form 37-44m	Goals and Objectives

[Print Errors](#) [Change Status](#)

NOTE: A red icon will indicate there are errors. All errors need to be corrected before the form can be made official. The error description will also be listed next to the red icon.



**Step 2:** Once the form has passed the error checking, you may select the form to be updated to official status.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
 (0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/19/2017	Form 37-44m	Goals and Objectives

**Step 3:** Click **Change Status**.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		04/19/2017	Form 37-44m	Goals and Objectives

**Step 4:** Enter the *Official Start Date* for this IEP.

**Please Enter the Official Start Date for this IEP**

Start Date:  \* MM/DD/YYYY

**Step 5:** Click **Save**.

**Step 6:** This will bring you back to the *IEP timeline* where you will now have the option to add progress report(s).

NOTE: The IEP status for the IEP becomes official once the IEP gets a start date.

Form: Form 37-44m: **Goals and Objectives**  
Date: **04/19/2017**  
Status: **Official**  
Update Info: **Schmitt, Kenzie - 4/20/2017 11:56:04 AM**

No Progress Reports Currently On File

**Step 7:** Select **Add progress report (Option 2: Data Chart)**.

Print Form   
Form Activity Log   
Add progress report (Option 1)   
**Add progress report (Option 2: Data Chart) **

Form: Form 37-44m: **Goals and Objectives**  
Date: **04/19/2017**  
Status: **Official**  
Update Info: **Schmitt, Kenzie - 4/20/2017 11:56:04 AM**

**Step 8:** Enter **Report Date**.

**Progress Report** Step 1 of 2

You are reporting progress on annual goals for this student. Enter the name of the person completing the report of progress and the report date.

Report Date:  \* MM/DD/YYYY  
Reporting Staff Member:  \*

Show Audit Trail

**Step 9:** Click **Search** to enter the name of the person completing the report.

Report Date:  \* MM/DD/YYYY  
Reporting Staff Member:  \*

**Step 9a:** Search for the personnel completing the report by *First Name, Last Name, Gender, or IEIN*.

**Progress Report** Step 1 of 2

You are reporting progress on annual goals for this student. Enter the name of the person completing the report of progress and the report date.

**Personnel Search**

Multiple  OR  Single

District:  IEIN:

Last Name:   
First Name:   
Gender:

Include Retired

Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

**Step 9b:** To select personnel in the search results, click the check-mark.

**Personnel Search**

Multiple OR Single

District: Jasper County CUD 1 IEIN:

Last Name: Schmitt

First Name:

Gender:

Include Retired

Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

**Personnel Search Results**

Select	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input checked="" type="checkbox"/>	██████	Mackenzie Schmitt					

**Step 9c:** Enter the *Title* of the *Reporting Staff Member* and click **Modify**.

Reporting Staff Member: Mackenzie Schmitt  \*

Title:  \*

**Title**  
No Records Found

**Step 9d:** Click **Add**.

When are you finished setting up the titles click Return.

Title(s) for **Mackenzie Schmitt**

**Title**

**Title**  
No Records Found

**Step 9e:** Select the personnel *Title* from the drop-down.

Select the new title and click the Save button.

Title:

**Step 9f:** Click **Save**.

Select the new title and click the Save button.

Title:

**Step 9g:** When complete, click **Return**.

Title(s) for **Mackenzie Schmitt**

Titles ( + Add)		
Edit	Delete	Title
		Special Education Teacher



**Step 10:** Click **Continue**.

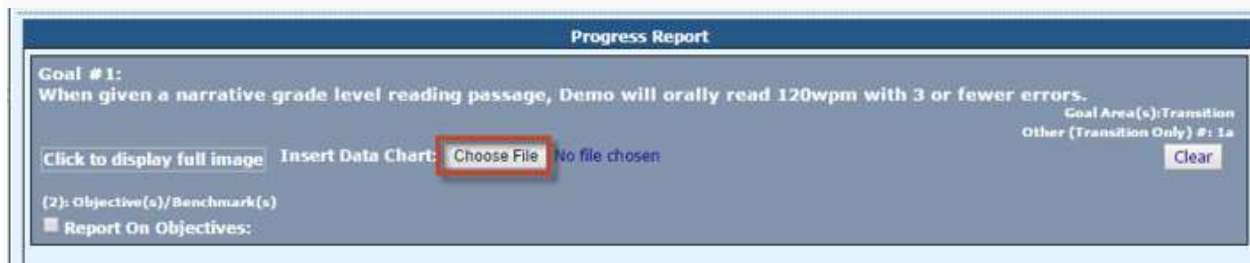


**Step 11:** Select how the student is progressing toward meeting his/her goal.

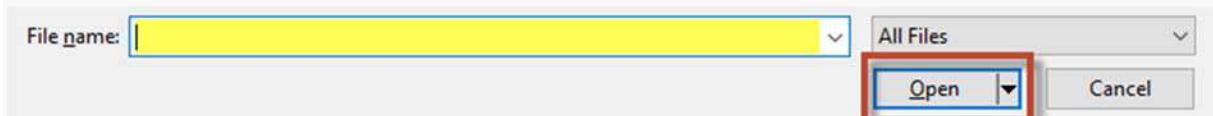
NOTE: You can report on the goals or the objectives but you must specify your reporting option for each goal statement

**Step 12:** To report the goals:

**Step 12a:** Insert a data chart that displays the student's progress in reading, writing, or math relative to his/her peer group for a visual representation of the student's growth. Click **Choose File**.

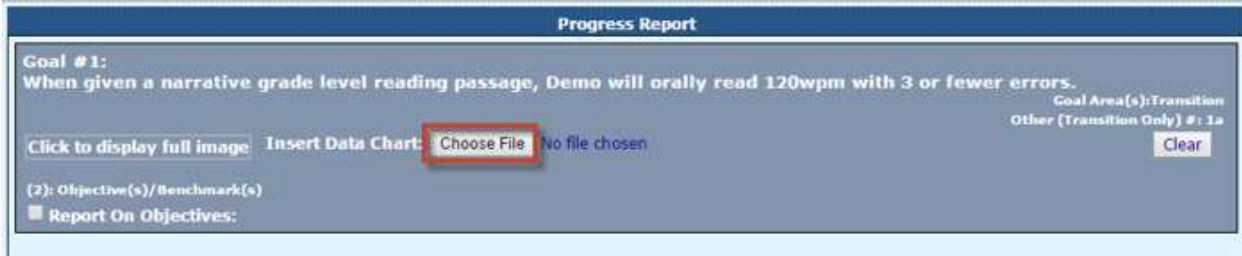


**Step 12b:** Browse the location of the *Data Chart*. Select and click **Open** to upload.



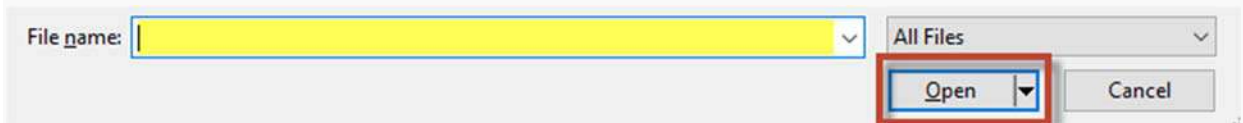
**Step 13:** To report the *Objective(s)/Benchmark(s)*:

**Step 13a:** Insert a data chart that displays the student's progress in reading, writing, or math relative to his/her peer group for a visual representation of the student's growth. Click **Choose File**.



The screenshot shows a 'Progress Report' form. At the top, it says 'Goal # 1: When given a narrative grade level reading passage, Demo will orally read 120wpm with 3 or fewer errors.' Below this, there are several buttons: 'Click to display full image', 'Insert Data Chart', 'Choose File', and 'No file chosen'. The 'Choose File' button is highlighted with a red box. To the right, there are labels for 'Goal Area(s): Transition' and 'Other (Transition Only) #: 1a', along with a 'Clear' button. At the bottom, there is a section for '(2): Objective(s)/Benchmark(s)' and a 'Report On Objectives:' checkbox.

**Step 13b:** Browse the location of the *Data Chart*. Select and click **Open** to upload.



The screenshot shows a file selection dialog box. It has a 'File name:' field with a yellow background. To the right, there is a dropdown menu set to 'All Files'. Below the dropdown, there is an 'Open' button with a dropdown arrow, which is highlighted with a red box, and a 'Cancel' button.

**Step 14:** When complete, click **Save**.



The screenshot shows a wizard's save options screen. It has three radio button options: 'Save - Please save this form.', 'Save and Preview - Please save this form and open the preview of the form.', and 'Cancel - Please exit the wizard.' The first option is selected and highlighted with a red box. At the bottom, there are four buttons: 'Previous' (with a left arrow), 'Cancel' (with a crossed-out circle), 'Save Now' (with a floppy disk icon), and 'Save' (with a right arrow), which is highlighted with a red box.

# Educational Accommodations and Support

**Step 1:** Under the *IEP Forms* tab, select the **Educational Accommodations and Support** form.

Select the Form		
Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	<b>Educational Accommodations and Support</b>	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Select **Yes** or **No** under the *Requires Aids/Services* section.

[Click Here to Add meeting notes](#)

Consideration of Special Factors											
Requires Aids/Services	Factors	Supplementary Aids									
<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Assistive technology</b> - devices and/or services. If yes, please specify needed AT. If no, specify why AT is not needed to access FAPE.	<div style="border: 2px solid red; padding: 10px; text-align: center;"> <p><b>NOTE: For any box checked "Yes", specify what aids, accommodations, and modifications are needed for the child to make progress toward annual goals.</b></p> <p>↓</p> <table border="1" style="width: 100%;"> <thead> <tr> <th colspan="3">Aids, Accommodations, and Modifications (Add)</th> </tr> <tr> <th>Actions</th> <th>Area</th> <th>Supplementary Aids</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;">No Records Found</td> </tr> </tbody> </table> </div>	Aids, Accommodations, and Modifications (Add)			Actions	Area	Supplementary Aids	No Records Found		
Aids, Accommodations, and Modifications (Add)											
Actions	Area		Supplementary Aids								
No Records Found											
<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Communication needs including students who are deaf/hard of hearing.</b> If yes, complete linguistic and cultural accommodations section below.										
<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Limited English proficiency</b> - language needs										
<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Blind/visually impaired</b> - provision of Braille instructions										
<input checked="" type="radio"/> Yes <input type="radio"/> No	<b>Behavior</b> - impedes student's learning or that of others. If yes, the team must consider strategies, including positive behavioral interventions and supports to address behavior. <b>This may include a Functional Behavioral Assessment and/or a Behavioral Intervention Plan. If so, attach any completed forms.</b>										
<input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Other</b> - special factors requiring supplementary aids, accommodations, and modifications										

**Step 3:** If **Yes** is selected, add *Aids, Accommodations, and Modifications* by clicking **Add**.

Aids, Accommodations, and Modifications (+ Add)		
Actions	Area	Supplementary Aids
No Records Found		

**Step 4:** Enter the *Area* and *Accommodation* in the text box.

Behavioral impediment - behavior impedes student's learning or that of others. If yes, the team must consider strategies, including positive behavioral interventions and supports to address behavior.

Area:

Accommodation:

**Step 5:** Click **Save**.

Area:

Accommodation:

**Step 6:** Click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

**Step 7:** Answer the questions by selecting **Yes** or **No**.

Linguistic and Cultural Accommodations/Support for School Personnel	
Relevant	Questions
<input type="radio"/> Yes <input type="radio"/> No	The student requires accommodations for the IEP to meet his/her linguistic and cultural needs.
<input type="radio"/> Yes <input type="radio"/> No	Special Education and related services will be provided in a language or mode of communication other than or in addition to English.
<input type="radio"/> Yes <input type="radio"/> No	Program trainings and/or supports for school personnel are needed for the student to advance appropriately toward attaining the annual goals, participate in the general curriculum, and be educated and participate with other students in educational activities.

**Step 8:** If **Yes**, specify in the text box below.

Linguistic and Cultural Accommodations/Support for School Personnel	
Relevant	Questions
<input type="radio"/> Yes <input checked="" type="radio"/> No	The student requires accommodations for the IEP to meet his/her linguistic and cultural needs.
<input type="radio"/> Yes <input checked="" type="radio"/> No	Special Education and related services will be provided in a language or mode of communication other than or in addition to English.
<input type="radio"/> Yes <input checked="" type="radio"/> No	Program trainings and/or supports for school personnel are needed for the student to advance appropriately toward attaining the annual goals, participate in the general curriculum, and be educated and participate with other students in educational activities.
<input checked="" type="radio"/> Yes <input type="radio"/> No	<b>If yes, specify what trainings and/or supports are needed, including when appropriate, the information that clarifies when the trainings and/or supports will be provided, by whom, in what location, etc.</b>
	Training on self-monitoring forms and behavior intervention plan for McKenzie's teachers by her case manager prior to 11/18/XX.
	Training on use of text readers for McKenzie's teachers by her case manager prior to 11/18/XX

**Step 9:** Select *Language and Communication Needs*.

Language and Communication Needs	
Select	
<input type="checkbox"/>	ASL
<input type="checkbox"/>	Auditory/Oral
<input type="checkbox"/>	Cued Speech
<input type="checkbox"/>	Speech Generated Device
<input type="checkbox"/>	Tactile
<input type="checkbox"/>	Signed English
<input type="checkbox"/>	Other (please describe)
<input type="checkbox"/>	

**Step 10:** List the *Opportunities for Direct Communication/Interaction*.

List the opportunities for direct communication/interaction with peers and professional personnel in the child's language and communication mode:

**Step 11:** List the *Identified Mode of Communication* the student will receive.

List the identified mode of communication accessible in academic instruction, school services, and extracurricular activities that the student will receive:

**Step 12:** When complete, click **Save**.

Save - Please save this form.

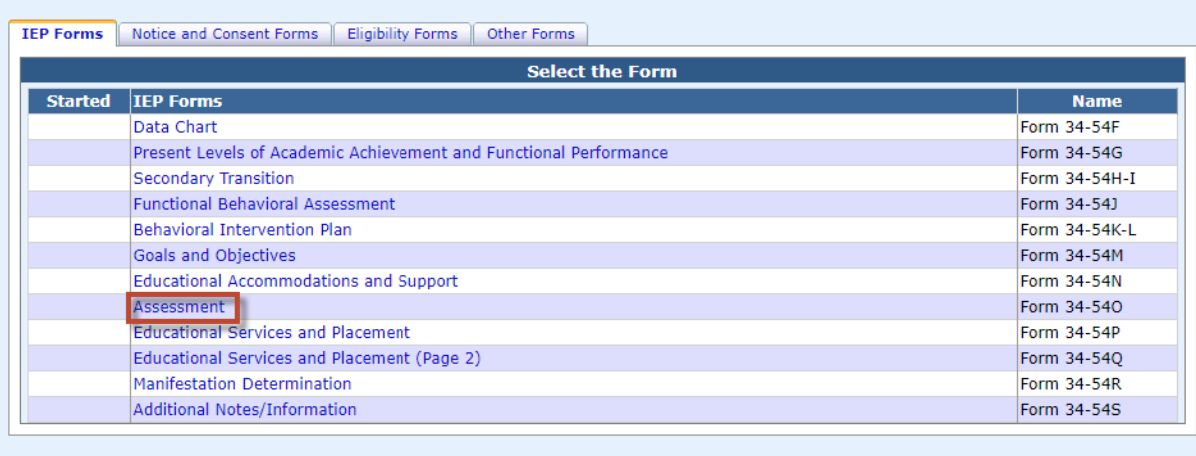
Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[Previous](#) [Cancel](#) [Save Now](#) [Save](#)

# Assessment

**Step 1:** From the *IEP Forms* tab, select **Assessment**.



Select the Form		
Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	<b>Assessment</b>	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Select the grade of the student will be in when assessment will be administered.

Select the grade the student will be in when the assessment will be administered:

**Step 3:** Select ONE of the *Classroom-Based Assessment* option.

CLASSROOM-BASED ASSESSMENTS	
Select	Options
<input type="radio"/>	Student will participate in classroom assessments with no accommodation(s).
<input checked="" type="radio"/>	Student will participate in classroom assessments with accommodation(s). (Complete Assessment Accommodations section on the IEP)

**Step 4:** Select a *District-Wide Assessment* option.

Select	Options
<input type="radio"/>	District does not administer district-wide assessments.
<input type="radio"/>	District does not administer district-wide assessments at this grade level: <b>6th</b>
<input type="radio"/>	Student will not participate in the entire district-wide assessment.
<input type="radio"/>	Participate with accommodation(s).(Complete Assessment Accommodations section)
<input type="radio"/>	Student will participate in the entire district-wide assessment with no accommodation(s).
<input type="radio"/>	Student will participate in the entire district-wide assessment with accommodation(s). (Complete Assessment Accommodations section on the IEP).
<input type="radio"/>	Student will participate in part(s) of the district-wide assessment (specify which part(s) and what if any, accommodations are required). (Complete Assessment Accommodations section on the IEP).
<input type="radio"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<input type="radio"/>	Student will participate in the district-wide alternate assessment without accommodation(s).
<input type="radio"/>	Student will participate in the district-wide alternate assessment with accommodation(s). (Complete Assessment Accommodations section on the IEP).

**Step 5:** At the bottom of the wizard, click **Continue**.

<input checked="" type="radio"/> Continue - Please continue the wizard.
<input type="radio"/> Save and Exit - Please save this form and exit the wizard.
<input type="radio"/> Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Continue →](#)

**Step 6:** Select *Illinois Assessments of Readiness (IAR)* for Grades 3-8.

Select	Options
<input type="radio"/>	The IAR assessment is not appropriate. (Go to #2)
<input type="radio"/>	Student will participate in IAR with no accessibility features turned on in advance and no accommodation(s).
<input type="radio"/>	Student will participate in IAR assessment with accessibility features turned on in advance and/or accommodation(s). (Complete the IAR Accessibility Features and Accommodations form and attach).

NOTE: For IAR and DLM Instructions, click on link located in the red box below.

If appropriate, check the box to indicate that the state-assessment is not provided at the student's particular grade level. Enter any needed accommodations or aids for any assessments for which the student is participating. For IAR Instructions see [this document](#). For DLM Instructions see [this document](#). If the student is an English Language Learner indicate any needs during ACCESS. [Help](#) ■

This information will be saved when you click Continue at the bottom of the wizard.

[Click Here to Add meeting notes](#)

STATE ASSESSMENTS	
<b>Illinois Assessments of Readiness (IAR) (grades 3-8)</b>	
Select	Options
<input type="radio"/>	The IAR assessment is not appropriate. (Go to #2)
<input type="radio"/>	Student will participate in IAR with no accessibility features turned on in advance and no accommodation(s).
<input type="radio"/>	Student will participate in IAR assessment with accessibility features turned on in advance and/or accommodation(s). (Complete the IAR Accessibility Features and Accommodations form and attach).
<b>Dynamic Learning Maps (DLM) (ELA/L, Math, Science) (Alternate assessment for grades 3-11)</b>	
Select	Options
<input type="radio"/>	The DLM Participation Guidelines were met. (Complete the DLM Participation Guidelines and attach).
<input type="radio"/>	Student will participate in DLM with no accessibility features/accommodation(s).
<input type="radio"/>	Student will participate in DLM with accessibility features/accommodation(s). (Complete the DLM Accessibility Features and Accommodations form and attach)

**Step 7:** Select *DLM, ELA/L, Math, Science* option for *Alternate assessment grades 3-8 and 11*.

<b>Dynamic Learning Maps (DLM) (ELA/L, Math, Science) (Alternate assessment for grades 3-11)</b>	
Select	Options
<input type="radio"/>	The DLM Participation Guidelines were met. (Complete the DLM Participation Guidelines and attach).
<input type="radio"/>	Student will participate in DLM with no accessibility features/accommodation(s).
<input type="radio"/>	Student will participate in DLM with accessibility features/accommodation(s). (Complete the DLM Accessibility Features and Accommodations form and attach)

**Step 7a:** If the top option is selected, you must complete the *DLM Participation Guidelines* and attach the reasons. Then, you will need to decide if the student will participate in DLM without or with accessibility feature/accommodations by selecting the appropriate option and filling out the correct forms.



NOTE: If the *Student will participate in DLM with no accessibility feature/accommodations*, you will only need to complete the *DLM Participation Guidelines* form.

**Dynamic Learning Maps (DLM) (ELA/L, Math, Science) (Alternate assessment for grades 3-11)**

Select	Options
<input checked="" type="radio"/>	The DLM Participation Guidelines were met. (Complete the DLM Participation Guidelines and attach).
<input type="radio"/>	Student will participate in DLM with <b>no accessibility features/accommodation(s)</b> .
<input type="radio"/>	Student will participate in DLM with accessibility features/accommodation(s). (Complete the DLM Accessibility Features and Accommodations form and attach)

**DLM Participation Guidelines**  
 Students with the most significant cognitive disabilities may take the DLM if participation in the state's regular assessments is not appropriate, even with accommodations, and they meet all of the criteria below.

Select	Participation Criteria	Participation Criterion Descriptors	Reason(s)
<input type="radio"/> Yes <input type="radio"/> No	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.	
<input type="radio"/> Yes <input type="radio"/> No	The student's instruction is linked to grade level content and reflective of the Common Core Essential Elements.	Goals and instruction listed in the IEP for this student are linked to the enrolled grade level Common Core Essential Elements and address knowledge and skills that are appropriate and challenging for this student.	
<input type="radio"/> Yes <input type="radio"/> No	The student requires extensive direct individualized instruction and substantial supports to achieve measureable 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 the alternative ways to acquire, maintain, generalize, demonstrate and transfer skills across multiple settings.	

NOTE: If the *Student will participate in DLM with accessibility feature/accommodations*, you will need to also complete the *DLM Participation Guidelines*, *DLM Accessibility Features*, and the *DLM Accommodations* form.

**Dynamic Learning Maps (DLM) (ELA/L, Math, Science) (Alternate assessment for grades 3-11)**

Select	Options
<input checked="" type="radio"/>	The DLM Participation Guidelines were met. (Complete the DLM Participation Guidelines and attach).
<input type="radio"/>	Student will participate in DLM with no accessibility features/accommodation(s).
<input type="radio"/>	Student will participate in DLM with accessibility features/accommodation(s). (Complete the DLM Accessibility Features and Accommodations form and attach)

**DLM Participation Guidelines**

Students with the most significant cognitive disabilities may take the DLM if participation in the state's regular assessments is not appropriate, even with accommodations, and they meet all of the criteria below.

Select	Participation Criteria	Participation Criterion Descriptors	Reason(s)
<input type="radio"/> Yes <input type="radio"/> No	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.	
<input type="radio"/> Yes <input type="radio"/> No	The student's instruction is linked to grade level content and reflective of the Common Core Essential Elements.	Goals and instruction listed in the IEP for this student are linked to the enrolled grade level Common Core Essential Elements and address knowledge and skills that are appropriate and challenging for this student.	
<input type="radio"/> Yes <input type="radio"/> No	The student requires extensive direct individualized instruction and substantial supports to achieve measureable 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 the alternative ways to acquire, maintain, generalize, demonstrate and transfer skills across multiple settings.	

**DLM Accessibility Features**

Category 1: Support provided within KITE via the PNP Profile	Magnification	Allows screen magnification during testing. The magnification options are 2x, 3x, 4x, 5x.	<input type="radio"/> Yes <input type="radio"/> No
	Overlay Color	The overlay color is the background color of the test; the default color is white. During testing there are other alternate colors options: blue, green, pink, gray, and yellow. The font will remain black.	<input type="radio"/> Yes <input type="radio"/> No
	Invert Color Choice	The invert color will cause the test background to appear black with white/gray lettering. Use with "contrast color" to change the display to a different color scheme.	<input type="radio"/> Yes <input type="radio"/> No
	Color Contrast	The contrast color section provides several background and lettering color schemes: white background with green font, white background with red font, black background with gray font, black background with yellow font.	<input type="radio"/> Yes <input type="radio"/> No
	Synthetic Spoken Audio(read aloud with highlighting)	<b>Text Only</b> Provides audio for the text and not for images.	<input type="radio"/> Yes <input type="radio"/> No

		<b>Text and Graphics</b> Provides audio for the text and an audio description of the images.	<input type="radio"/> Yes <input type="radio"/> No
		<b>NonVisual</b> Provides audio for the text, an audio description of the images, and an audio description of the layout.	<input type="radio"/> Yes <input type="radio"/> No
Category 2: Support Requires Additional Tools/Materials	Uncontracted Braille	Uncontracted (only available option)	<input type="radio"/> Yes <input type="radio"/> No
	Single Switch System	Is activated using a switch set up to simulate the "Enter" key on the keyboard. On the PNP, educators can set scan speed, indicate whether scanning should begin automatically when the page appears, and select the number of times the scan cycle repeats before stopping.	<input type="radio"/> Yes <input type="radio"/> No
	Two-Switch System	Does not require activation in the PNP. Is used to emulate the tab key to move between choices, and the Enter key to select the choice when highlighted.	<input type="radio"/> Yes <input type="radio"/> No
	Individualized Manipulatives	Manipulatives that is familiar to the students to use while testing (i.e. unit cubes, interlocking blocks, counters, etc.)	<input type="radio"/> Yes <input type="radio"/> No
	Calculator	Permitted to use on math testlets unless it interferes with the construct of the testlet. The Test Information Page (TIP) for each math testlet will specify whether or not a calculator is permitted.	<input type="radio"/> Yes <input type="radio"/> No

### DLM Accommodations

Category 3: Support provided by the Test Administrator Outside the DLM System			
	Human Read Aloud	If the student does not respond well to the synthetic voice, the test administrator may read the assessment to the student.	<input type="radio"/> Yes <input type="radio"/> No
	Signed interpretation of text	Signing is not provided via the computer. For students who sign, test administrators may sign the content to the student using American Sign Language (ASL), Exact English, or a personalized sign system.	<input type="radio"/> Yes <input type="radio"/> No
	Language Translation of Text (Math only)	Test administrators may translate the text for students who are English Language learners or respond best to a language other than English on the math assessment only.	<input type="radio"/> Yes <input type="radio"/> No
	Test administrator enters responses for student	If a student is unable to independently and accurately record his/her own responses into the system, the student may indicate the selected responses through normal response types and/or forms of communication such as eye gaze, and the test administrator will keys in the student's response.	<input type="radio"/> Yes <input type="radio"/> No
	Partner-Assisted Scanning	A strategy in which test administrators assist students with scanning, or going through, students' answer choices. Test administrators read and/or point to each answer choice and the students indicate when their desired choice is presented.	<input type="radio"/> Yes <input type="radio"/> No
Team-defined	Any accommodations that are not addressed may be implemented IF the accommodation does not negate the purpose of the assessment. Any accommodation used during testing should be familiar to the student through previous use in the student's instructional program.	<input type="radio"/> Yes <input type="radio"/> No	

### Step 8: Click Continue.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

**Step 9:** Select a *Physical Fitness Assessment*.

Indicate below which state academic assessment(s) this student will take and, if applicable, if accessibility feature(s) and/or accommodation(s) are needed.

**Physical Fitness Assessment (e.g. Fitness Gram®, Brockport®)**

Select	Options
<input type="radio"/>	Student will participate in physical education assessment with accommodation(s).
<input type="radio"/>	Student will participate in the Brockport® assessment with no accommodation(s).
<input type="radio"/>	Student will participate in the Brockport® assessment with accommodation(s).
<input type="radio"/>	Will not participate in the physical fitness assessment (Explain): <input type="text"/>
<input type="radio"/>	Student will participate in physical education assessment with no accommodation(s).

**Step 10:** If applicable, list assessment to be given for *Kindergarten Individual Development Survey (KIDS)*.

**Kindergarten Individual Development Survey (KIDS)**

Select	Options
<input type="radio"/>	The KIDS Assessment is not appropriate. <input type="text"/>
<input type="radio"/>	Participate in KIDS with no accommodation(s). Indicate which subsets:1,2,3 <input type="text"/>
<input type="radio"/>	Participate in KIDS with accommodation(s). Indicate which subsets:1,2,3 Indicate which accommodations are needed: <input type="checkbox"/> Communication Devices <input type="checkbox"/> Braille <input type="checkbox"/> Enlarged Print/pictures <input type="checkbox"/> FM System <input type="checkbox"/> Adapted Writing Utensils <input type="checkbox"/> Adapted Scissors <input type="text"/>

**Step 11:** The *State Assessment of English Language Proficiency* is prepopulated from SIS.

**STATE ASSESSMENT OF ENGLISH LANGUAGE PROFICIENCY**

ELL Status is maintained in SIS and this checkbox is populated from that data.

Yes  No The student is an English Learner (EL)

Participate in the ACCESS with no accommodation(s).  Participate in the alternate ACCESS with no accommodation(s).

Participate in the ACCESS with accommodation(s).  Participate in the alternate ACCESS with accommodation(s).

**Step 12:** Click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Continue →](#)

**Step 13:** Enter any *Accommodations* or alternate assessment/methods associated with the student.

ASSESSMENT ACCOMMODATIONS	
Accommodations	
Classroom-Based Assessments	
District-Based Assessments	
College Board Assessments	
Science Assessment	
Physical Fitness Assessment (e.g. Fitness Gram®, Brockport®)	
KIDS Assessment	
ACCESS/Alternate ACCESS	

**Step 14:** When complete, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Save →](#)

## Educational Services and Placement

**Step 1:** Under the *IEP Forms* tab, select **Educational Services and Placement** form.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	<b>Educational Services and Placement</b>	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Enter the *Initiation* and *Duration Date*.

NOTE: The *Initiation Date* is the first day of school following the finalization of the IEP. This should be listed as an eight digit date.

Example: If the IEP is completed on 10/23/2007, then the initiation date should be 10/24/2007. However, if 10/23/2007 is a Friday or before a break, then the initiation date should always be the NEXT school day during which students will be in attendance.

NOTE: *Duration* should be listed as the amount it is thought the service will be provided prior to the next anticipated IEP meeting. In most cases, this will be one year.

Example: Meeting is held on 10/23/2007. Initiation date would be 10/24/2007 and the duration date would be 10/24/2008.

Initiation Date:  \* MM/DD/YYYY

Duration Date:  \* MM/DD/YYYY

**Step 3:** Click **Modify** to enter the *General Education with no Supplementary Aids*.

Participation in General Education Services

General Education with no Supplementary Aids (Specify content areas, classes, whether or not the child will participate in general physical education, and extracurricular and other nonacademic activities.)

Content Area/Class	Minutes per Week
No Records Found	

Details (X) **Modify**

**Step 4:** Click **Add**.

Details for General Education with no Supplementary Aids (+) **Add**

Content Area/Class	Minutes Per Week
No Records Found	

**Step 5:** Enter the *Content Area/Class*.

Content Area/Class

**Step 6:** Enter *Minutes per week (optional)*.

Minutes per week (optional)

**Step 7:** Click **Save**.

Content Area/Class: General Education P.E.  
-Team sports (basketball)

Minutes per week (optional): 225

**Save** Cancel

**Step 8:** To add additional *Content Area/Class* repeat steps 4-7. When complete, click **Return**.

Details for General Education with no Supplementary Aids (+ Add)			
Edit	Delete	Content Area/Class	Minutes Per Week
		General Education P.E. -Team sports (basketball)	225
		Art/ Sculpture	225

**Return**

**Step 9:** Click **Modify** to enter the *General Education with Supplementary Aids*.

**General Education with Supplementary Aids (as specified in the Supplementary Aids Section)** (Specify content areas, classes, whether or not the child will participate in general physical education, and extracurricular and other nonacademic activities with supports, if applicable.)

Details	
Content Area/Class	Minutes per Week
No Records Found	

**Step 10:** Click **Add**.

Details for General Education with Supplementary Aids (as specified in the Supplementary Aids Section) (+ Add)	
Content Area/Class	Minutes Per Week
No Records Found	

**Step 11:** Enter the *Content Area/Class*.

Content Area/Class:

**Step 12:** Enter *Minutes per week (Optional)*.

Minutes per week (optional)



**Step 13:** When complete, click **Save**.

Content Area/Class:

Minutes per week (optional):

**Step 14:** To add additional *Content Area/Class*, repeat steps 10-13. When complete, click **Return**.

Details for General Education with Supplementary Aids (as specified in the Supplementary Aids Section) (+ Add)

Edit	Delete	Content Area/Class	Minutes Per Week
		Social Studies	225

**Step 15:** Click **Modify** to enter the *Special Education and Related Services within the General Education Classroom (A)*.

Special Education and Related Services within the General Education Classroom (A) (Specify content areas and classes in which the child will participate with the provision of special education and related services. List each special education and related service that will be provided during each class.)

Details

Content Area/Class	Minutes per Week
No Records Found	

**Step 16:** Click **Add**.

Details for Special Education and Related Services within the General Education Classroom

Content Area/Class	Minutes Per Week
No Records Found	

**Step 17:** Enter *Content Area/Class*.

Content Area/Class:

**Step 18:** Enter the *Minutes per week*.

Minutes per week:

**Step 19:** Click **Save**.

Content Area/Class:

Minutes per week:

**Step 20:** To add additional *Content Area/Class*, repeat steps 16-19. When complete, click **Return**.

Details for Special Education and Related Services within the General Education Classroom (+ Add)			
Edit	Delete	Content Area/Class	Minutes Per Week
		Co-taught Mathematics in the general education classroom	225

**Step 21:** Click **Modify** to enter *Special Education Services - Outside General Education (B)*.


Participation in Special Education Services

Special Education Services - Outside General Education (B)

Details 	
Content Area/Class	Minutes per Week
No Records Found	

**Step 22:** Click **Add** to enter details for *Special Education Services - Outside General Education (B)*.

You are managing details for **Special Education Services - Outside General Education (B)**. When you are done setting up the details click Return.

Details for Special Education Services - Outside General Education (  Add )

Content Area/Class	Minutes Per Week
No Records Found	

**Step 23:** Enter *Content Area/Class*.

Content Area/Class:



**Step 24:** Enter *Minutes per week*.

Minutes per week:

**Step 25:** Click **Save**.

Content Area/Class:

Minutes per week:

**Step 26:** To add additional *Content Area/Class* repeat steps 22-25. When complete, click **Return**.

Details for Special Education Services - Outside General Education ( + Add)			
Edit	Delete	Content Area/Class	Minutes Per Week
		Instructional Reading class in special education room	225
		Resource / study skills class in special education room	225
		Pull-out for assistance with classwork in history and science	50

**Return**

**Step 27:** Click **Modify** to enter *Special Education Services - Outside General Education (C)*.

Related Services - Outside General Education (C)	
Details	
Content Area/Class	Minutes per Week
No Records Found	

**Step 28:** Click **Add** to enter details for *Special Education Services - Outside General Education (C)*.

You are managing details for **Related Services - Outside General Education (C)**. When you are done setting up the details click Return.

Details for Related Services - Outside General Education ( + Add)	
Content Area/Class	Minutes Per Week
No Records Found	

**Step 29:** Enter *Content Area/Class*.

Content Area/Class:

**Step 30:** Enter *Minutes per week*.

Minutes per week:

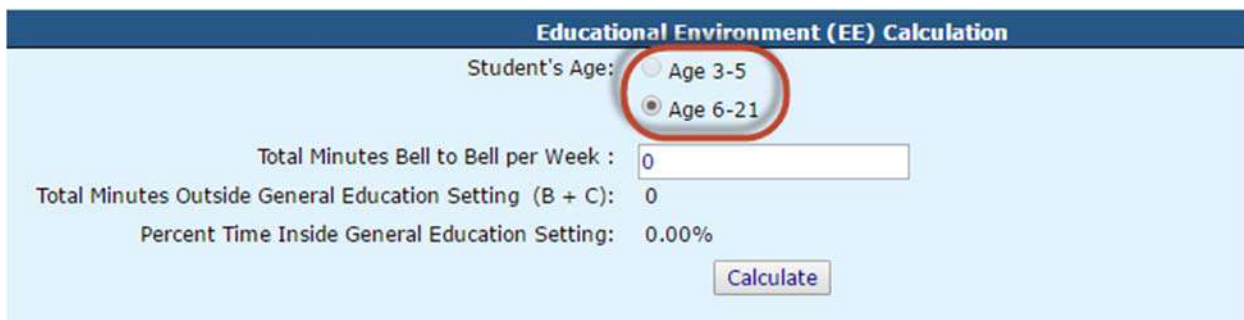
**Step 31:** When complete, click **Save**.



**Step 32:** To add additional *Content Area/Class*, repeat steps 28-31. When complete, click **Return**.



**Step 33:** Select the *Student's Age* in the *Educational Environment (EE) Calculation* box.



**Educational Environment (EE) Calculation**

Student's Age:  Age 3-5  
 Age 6-21

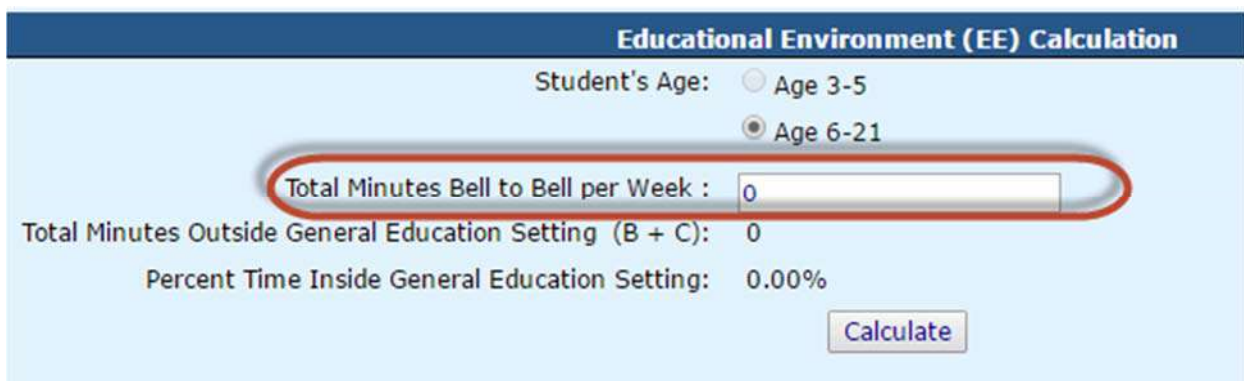
Total Minutes Bell to Bell per Week : 0

Total Minutes Outside General Education Setting (B + C): 0

Percent Time Inside General Education Setting: 0.00%

Calculate

**Step 34:** Enter *Total Minutes Bell to Bell per week*.



**Educational Environment (EE) Calculation**

Student's Age:  Age 3-5  
 Age 6-21

Total Minutes Bell to Bell per Week : 0

Total Minutes Outside General Education Setting (B + C): 0

Percent Time Inside General Education Setting: 0.00%

Calculate

**Step 35:** Click **Calculate**.

**Educational Environment (EE) Calculation**

Student's Age:  Age 3-5  
 Age 6-21

Total Minutes Bell to Bell per Week :

Total Minutes Outside General Education Setting (B + C): 0

Percent Time Inside General Education Setting: 0.00%

**Step 36:** Enter the *Total Instructional Minutes per week*.

**Percent of Total Special Education Minutes**

Special Education Minutes per Week (A + B + C): 0

Total Instructional Minutes per Week:

Percent of total Special Education Minutes: 0.00%

**Step 37:** Click **Calculate** to populate the *Percent of Total Special Education Minutes*.

**Percent of Total Special Education Minutes**

Special Education Minutes per Week (A + B + C): 0

Total Instructional Minutes per Week:

Percent of total Special Education Minutes: 0.00%

**Step 35:** When complete, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

# Educational Services and Placement (Page 2)

**Step 1:** Under the *IEP Forms* tab, Select **Educational Services and Placement (Page 2)** form.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support Assessment	Form 34-54N
	Educational Services and Placement	Form 34-54P
	<b>Educational Services and Placement (Page 2)</b>	Form 34-54Q
	Manifestation Determination	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Select **Yes** or **No** along with explanation for *Relevant Educational Environment Considerations*.

[Click Here to Add meeting notes](#)

Educational Environment Considerations	
<b>Relevant</b> <input type="radio"/> Yes <input type="radio"/> No	Special education classes, separate schooling, or removal from the regular education environment is required because the nature or severity of the student's disability is such that education in general classes with the use of supplementary aids and services cannot be achieved satisfactorily. <b>If yes, explain:</b>
<input type="radio"/> Yes <input type="radio"/> No	Will participate in nonacademic activities with nondisabled peers and have the same opportunity to participate in extracurricular activities as nondisabled peers. <b>If no, explain:</b>
<input type="radio"/> Yes <input type="radio"/> No	Will attend the school he or she would attend if nondisabled. <b>If no, explain:</b>

Transportation	
<b>Relevant</b> <input type="radio"/> Yes <input type="radio"/> No	Special transportation is required to and from schools and/or between schools.
<input type="radio"/> Yes <input type="radio"/> No	Special transportation is required in and around school buildings.
<input type="radio"/> Yes <input type="radio"/> No	Specialized equipment (such as special or adapted buses, lifts, and ramps) is required.

**Step 3:** Select **Yes** or **No** to determine if the *Transportation* is relevant.

Transportation	
<b>Relevant</b>	
<input type="radio"/> Yes <input type="radio"/> No	Special transportation is required to and from schools and/or between schools.
<input type="radio"/> Yes <input type="radio"/> No	Special transportation is required in and around school buildings.
<input type="radio"/> Yes <input type="radio"/> No	Specialized equipment (such as special or adapted buses, lifts, and ramps) is required.

**Step 4:** When complete, click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Continue →](#)

**Step 5:** Determine if parents have been informed of *Illinois School for the Deaf/Visually Impaired*.

**Illinois School for the Deaf/Illinois School for the Visually Impaired**

For a child who is deaf, hard of hearing, blind or visually impaired, parents have been informed of existence of the Illinois School for the Deaf or the Illinois School for the Visually Impaired, and other local schools that provide similar services.

Yes  N/A

**Step 6:** To add *Placement Considerations*, click **Add**.

Placement Considerations <a href="#">+ Add</a>			
Actions	Placement Options Considered	Potentially Harmful Effect/Reasons Rejected	Team Accepts Placement
No Records Found			

**Step 7:** Enter the *Placement Options Considered*.

Placement Options Considered:

Potentially Harmful Effect / Reasons Rejected:

Team Accepts Placement:  Yes  No

[Save](#) [Cancel](#)



**Step 8:** Enter the *Potentially Harmful Effect/Reasons Rejected*.

Potentially Harmful Effect / Reasons Rejected:

**Step 9:** Select **Yes** or **No** to determine if the *Team Accepts Placement*.

Team Accepts Placement:  Yes  No

**Step 10:** When complete, click **Save**.

[Click Here to Add meeting notes](#)

Placement Options Considered:

Potentially Harmful Effect / Reasons Rejected:

Team Accepts Placement:  Yes  No

**Step 11:** To enter *Placement Decisions* and click **Add**.

Placement Decisions (Add)		
Actions	FTE	Serving School/Facility
No Records Found		

**Step 12:** To locate the *Serving School/Facility* click **Search**.

**Educational Services and Placement** Step 3 of 4

**Placement Considerations**  
When completing this section, the team must document the reasons why placements considered were rejected. Additionally, the team must consider and document any potentially harmful effect of the proposed placement on the student or the quality of services he/she needs.

**Placement Decisions**  
Complete this section by selecting the school(s)/facility(s) that are determined suitable for students placement. [Help](#)

*This information will be saved when you click Continue at the bottom of the wizard.*

[Click Here to Add meeting notes](#)

Serving School/Facility  \*

Full Time Equivalent (FTE):  \* (example: 0.2, 0.5 etc. )

**Step 13:** Enter the desired search criteria, and click **Search**.

**Entity Search**

**General Search**

Name:

Address:

City:

within  miles of

Zip Code:

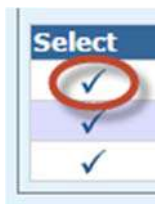
RCDT:

**Additional Search Criteria**

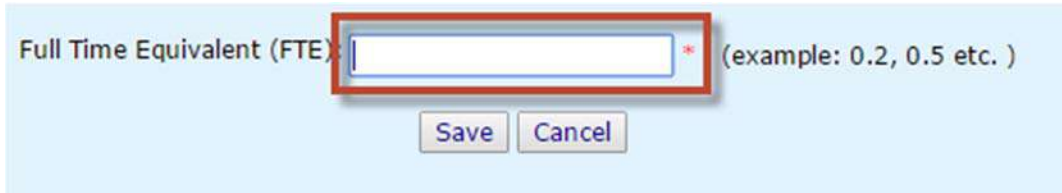
County:

Facility Type:

**Step 14:** Once the entity is found in the results, select the check-mark to add.



**Step 15:** Enter *FTE (Full Time Equivalent)*.



Full Time Equivalent (FTE) \* (example: 0.2, 0.5 etc. )

Save Cancel

**Step 16:** When complete, click **Save**.



Save Cancel

**Step 17:** To move onto the next wizard, click **Continue**.



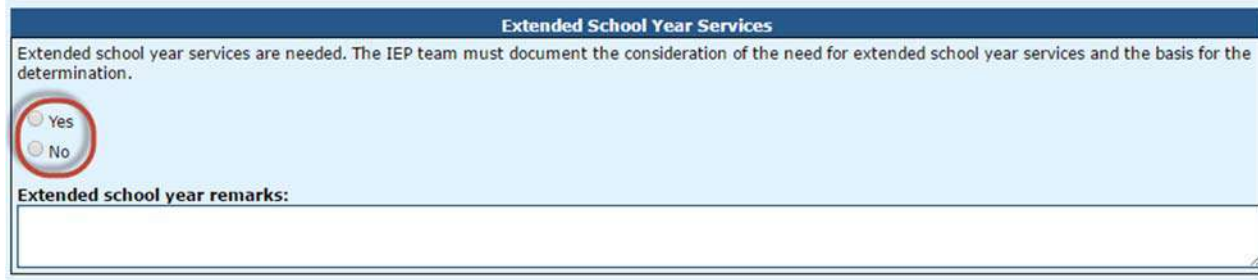
Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

← Previous Cancel Continue →

**Step 18:** Select **Yes** or **No** to determine if extended school year services are needed.



**Extended School Year Services**

Extended school year services are needed. The IEP team must document the consideration of the need for extended school year services and the basis for the determination.

Yes

No

Extended school year remarks:

**Step 19:** Enter *Extended school year Remarks*.



Extended school year remarks:

**Step 20:** If **Yes** is selected, you must add *Extended School Year Services Detailed Section*. Click **Add**. If **No** was Selected in the *Extended School Year Service* skip to step 27.

**Extended School Year Services**

Extended school year services are needed. The IEP team must document the consideration of the need for extended school year services and the basis for the determination.

Yes  
 No

**Extended school year remarks:**  
 Reading probes given at the start of the school year showed a loss of 20 WCPM and 15 of 100 sight words, and well as a decrease in reading comprehension from an average of 6/10 questions correct to 4/10 on the same grade level reading material.

**Extended School Year Services Detailed Section** (Add)

Actions	Special Education Service	Location	Amount/Frequency of Services	Initiation Of Services	Duration Of Services	Goal(s) Addressed
No Records Found						

**Step 21:** Enter *Special Education Service*.

Special Education Service:  \*

Location:

Amount/Frequency:

Initiation of Services:  MM/DD/YYYY

Duration of Services:  MM/DD/YYYY

**Step 22:** Enter *Location*.

Special Education Service:  \*

Location:  \*

Amount/Frequency:

Initiation of Services:  MM/DD/YYYY

Duration of Services:  MM/DD/YYYY

**Step 23:** Enter *Amount/Frequency*.

Special Education Service:  \*

Location:

Amount/Frequency:  \*

Initiation of Services:  MM/DD/YYYY

Duration of Services:  MM/DD/YYYY

**Step 24:** Enter the *Initiation and Duration of Services*.

Special Education Service:  \*

Location:

Amount/Frequency:

Initiation of Services:

Duration of Services:

**Step 25:** Select *Goal Statements Addressed*.



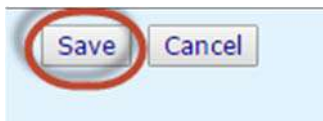
NOTE: If you do not see *Goal Statements* listed below, you will need to create a new, or modify an existing, 37-44M- Goals and Objective form and mark the applicable goals as ESY. Below is a screenshot of what this may look like:

The extended year services and goals are associated here from the goals marked as Extended School Year (ESY) on the Goals and Objectives form. To have goals appear as available for selection in this grid you will need to create a new, or modify an existing, 3744 M - Goals and Objective form and mark the applicable goals as ESY.

\* Note: You can only choose goals on this page if Form 37-44m Goals and Objectives/Benchmarks is marked official.

Goal Statements		
Select	Goal Number	Statement
No Records Found		

**Step 26:** When complete, click **Save**.



**Step 27:** Click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save →](#)

# Manifestation Determination

**Step 1:** From the *IEP Forms* tab, select **Manifestation Determination** form.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	<b>Manifestation Determination</b>	Form 34-54R
	Additional Notes/Information	Form 34-54S

**Step 2:** Enter the description of the *Incident(s) that Resulted in Disciplinary Action*.

[Click Here to Add meeting notes](#)

Primary Disability: None  
Secondary Disability: None

Manifestation Determination (As Appropriate)	
	Remarks
<b>Incident(s) that Resulted in Disciplinary Action</b>	
Include a description of the student's behavior that resulted in the need for a manifestation determination.	
<div style="border: 1px solid red; height: 30px;"></div>	

**Step 3:** Enter the *Student's IEP and Placement*.

**The Student's IEP and Placement (include a review of all relevant information in the child's file, including the child's IEP)**  
Include a review of all relevant information in the child's file, including the child's IEP. If the IEP was not implemented, the team should document why it was not implemented and whether the failure to implement impacted the student's behavior.

**Step 4:** Enter the *Observation of the Student*.

**Observation of the Student (include a review of staff observations regarding the student's behavior)**  
Include a review of staff observations regarding the student's behavior. This should include an analysis of the child's behavior across settings and times throughout the school day.

**Step 5:** Enter the *Information provided by the Parents*.

**Information provided by the Parents (include a review of any relevant information provided by the parent(s))**  
Include a review of any relevant information provided by the parents.

**Step 6:** Select **Yes** or **No** to conduct the cause and effect of the *Manifestation Determination*.

<input type="radio"/> Yes	<input type="radio"/> No	- The conduct was caused by or had a direct and substantial relationship to the student's disability.
<input type="radio"/> Yes	<input type="radio"/> No	- The conduct was the direct result of the school district's failure to implement the IEP.

**Step 7:** When complete, click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

[← Previous](#)      [Cancel](#)      [Save Now](#)      [Continue →](#)

**Step 8:** Depending on what was determined on the *Manifestation Determination*, you will see ONE of the following messages below:

**A.)**

**Manifestation Determination** Step 3 of 3

You are documenting the student's behavior and if it was manifested by his/her disability.

---

The student's behavior **was** a manifestation of his/her disability. The team must review and revise the student's IEP as appropriate and the district must take appropriate action. A functional behavior analysis will or has been completed. The behavior intervention plan shall be completed or modified/reviewed as required to address behavior.

- 1. The IEP team must conduct a functional behavioral assessment, unless the LEA has already completed one, and implement a behavioral intervention plan.**
- 2. If a behavioral intervention plan was already developed, review it and modify it, as necessary to address the behavior.**
- 3. Return the child to the placement from which the child was removed, unless the LEA and parent agree to a change in placement.**

---

Save - Please save this form.


Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#)      [Cancel](#)      [Save →](#)

## B.)

You are documenting the student's behavior and if it was manifested by his/her disability. [Help](#) ■

 [Click Here to Add meeting notes](#)

The student's behavior **was not** a manifestation of his/her disability. The relevant procedure applicable to students without disabilities may be applied to the student in the same manner in which they are applied to students without disabilities. If the district initiates disciplinary procedures applicable to all students, the district shall ensure that the special education and disciplinary records of the student with a disability are transmitted for consideration by the person or persons making the final determination regarding the disciplinary action.

**Step 9:** Once reviewed, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save →](#)



## Additional Notes/ Information

**Step 1:** From the *IEP Forms* tab, select the **Additional Notes/Information** form.

The screenshot shows a software interface with a tabbed menu at the top containing 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'IEP Forms' tab is active, displaying a table titled 'Select the Form'. The table has three columns: 'Started', 'IEP Forms', and 'Name'. The 'Additional Notes/Information' row is highlighted with a red border.

Started	IEP Forms	Name
	Data Chart	Form 34-54F
	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
	Secondary Transition	Form 34-54H-I
	Functional Behavioral Assessment	Form 34-54J
	Behavioral Intervention Plan	Form 34-54K-L
	Goals and Objectives	Form 34-54M
	Educational Accommodations and Support	Form 34-54N
	Assessment	Form 34-54O
	Educational Services and Placement	Form 34-54P
	Educational Services and Placement (Page 2)	Form 34-54Q
	Manifestation Determination	Form 34-54R
	<b>Additional Notes/Information</b>	Form 34-54S

**Step 2:** Enter the desired *Additional Notes/Information* for this student.

The screenshot shows a text entry area for 'Additional Notes/Information'. Above the text area, there is a message: 'You are adding additional notes/information to this IEP. [Help](#)'. The text area itself is a large, empty rectangular box with a red border.

**Step 3:** When complete, click **Save**.

The screenshot shows the bottom of the form with three radio button options: 'Save - Please save this form.', 'Save and Preview - Please save this form and open the preview of the form.', and 'Cancel - Please exit the wizard.'. Below these options are four buttons: 'Previous' (with a left arrow), 'Cancel' (with a red 'X' icon), 'Save Now' (with a floppy disk icon), and 'Save' (with a right arrow). The 'Save' button is highlighted with a red border.

# Notice & Consent Forms



The screenshot shows a software interface with four tabs: 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Notice and Consent Forms' tab is selected, indicated by a red arrow. Below the tabs is a table titled 'Select the Form'. The table has three columns: 'Started', 'IEP Forms', and 'Name'. The 'Started' column is empty. The 'IEP Forms' column lists various form titles, and the 'Name' column lists their corresponding form numbers. A red box highlights the entire table area.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

# Request for an Evaluation

**Step 1:** Under the *Notice and Consent Forms* tab, select **Request for an Evaluation** form.

Started	IEP Forms	Name
	<b>Request for an Evaluation</b>	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** Select the *Type* of evaluation.

**Decision Regarding a Request for an Evaluation** Step 1 of 3

If an evaluation/reevaluation is determined to be necessary, this form is to be utilized in conjunction with the Parent/Guardian Consent for Evaluation or Parent/Guardian Consent for Reevaluation, whichever is appropriate to the situation. When a request for an evaluation is received by a district, a response for evaluation determination must be ascertained and parent/guardian given this notification within fourteen school days. [Help](#)

*This information will be saved when you click Continue at the bottom of the wizard.*

Type:  Initial Evaluation  
 Re-Evaluation

Form Date:  MM/DD/YYYY

Request Date:  MM/DD/YYYY

Requestor:

**Step 3:** Select the *Form Date*.

Form Date:  MM/DD/YYYY

**Step 4:** Enter the *Request Date*.

Request Date:  MM/DD/YYYY

**Step 5:** Click **Search** to add the *Requestor*.

Type:  Initial Evaluation  
 Re-Evaluation

Form Date:  \* MM/DD/YYYY

Request Date:  MM/DD/YYYY

Requestor:

**Step 5a:** Enter the information in the boxes below and click **Search**.

**Other Individual Search**

Basic	Extended
First Name: <input type="text"/>	Ethnicity: <input type="text"/>
Last Name: <input type="text"/>	Language: <input type="text"/>
Address: <input type="text"/>	Gender: <input type="text"/>
City: <input type="text"/>	
<input type="checkbox"/> within <input type="text"/> miles of	
Zip Code: <input type="text"/>	
<input type="button" value="Search"/>	<input type="button" value="Clear Search"/> <input type="button" value="Cancel"/>

**Step 5b:** If the requestor is found, they will populate in the box below. To select the requestor, click the check-mark.

### Other Individual Search

Basic	Extended
First Name: <input type="text"/>	Ethnicity: <input type="text"/>
Last Name: <input type="text" value="Schmitt"/>	Language: <input type="text"/>
Address: <input type="text"/>	Gender: <input type="text"/>
City: <input type="text"/>	
<input type="checkbox"/> within <input type="text"/> miles of	
Zip Code: <input type="text"/>	
<input type="button" value="Search"/> <input type="button" value="Clear Search"/> <input type="button" value="Cancel"/>	

### Search Results ( )

Select	Name	Gender	Phone	Email
<input checked="" type="checkbox"/>	Kenzie Schmitt	Female	(618) 272-7470	
<input checked="" type="checkbox"/>	Kenzie Schmitt	Female	(618) 272-7470	

**Step 5c:** The Requestor name will appear.

### Decision Regarding a Request for an Evaluation Step 1 of 3

If an evaluation/reevaluation is determined to be necessary, this form is to be utilized in conjunction with the Parent/Guardian Consent for Evaluation or Parent/Guardian Consent for Reevaluation, whichever is appropriate to the situation. When a request for an evaluation is received by a district, a response for evaluation determination must be ascertained and parent/guardian given this notification within fourteen school days.

**This information will be saved when you click Continue at the bottom of the wizard.**

Type:  Initial Evaluation  
 Re-Evaluation

Form Date:  \* MM/DD/YYYY

Request Date:  MM/DD/YYYY

Requestor:

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

**Step 6:** To add a requestor, click **Add**.

Search Results <span>+ Add</span>				
Select	Name	Gender	Phone	Email
No Records Found				

**Step 6a:** Enter the required fields such as *Fist Name*, *Last Name*, and *Gender*. You will also be able to enter any other desired fields as well. This may include *Prefix*, *Middle Name*, *Suffix*, *Maiden Name*, *Birthdate*, *Ethnicity*, and/or *Email*.

### Person Profile Step 1 of 4

Please enter the required information and click Continue.

Prefix:

First Name:  \*

Middle Name:

Last Name:  \*

Suffix:

Maiden Name:

Gender:  \*

Birthdate:  MM/DD/YYYY

Ethnicity:

Email:

Interpreter Needed:

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

**Step 6b:** If an Interpreter is needed, check the box *Interpreter Needed*.

Interpreter Needed:

**Step 6c:** When complete, click **Continue**.

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

**Step 6d:** Review the people listed below select the button located under the *Details* column.

**Person Profile** Step 1 of 4

Please enter the required information and click Continue.

---

**The system has identified a possible existing profile matching the information you entered.**  
Please review the people listed below to determine if they are the person you are trying to create.

Existing Profiles						
Details	Name	Birthdate	Email Address	Gender	Ethnicity	Phone
<input checked="" type="radio"/>	John Smith			Male		(222) 222-2222

If you do not find a profile matching the one you wish to create then click Continue with New Profile.

**Step 6e:** Review the details to determine which button to click. If the information above is correct, click **Use This Profile**. If this information above is incorrect, click **This is Not the Person**.

The system has identified a possible existing profile matching the information you entered.  
 Please review the people listed below to determine if they are the person you are trying to create.

Details for **John Smith**

Phone Numbers		Addresses	
Type	Number	Type	Address
Mobile	(222) 222-2222	Home	123 Main Street HARRISBURG, IL 62946
Home	(555) 555-5555		

Languages		Profile Types	
Language		Profile Type	
		Parent	
		Student Guardian	

**Step 6f:** If you do not find a profile matching the one you wish to create then click **Continue with New Profile**.

Please review the people listed below to determine if they are the person you are trying to create.

Existing Profiles						
Details	Name	Birthdate	Email Address	Gender	Ethnicity	Phone
<input type="radio"/>	John Smith			Male		(222) 222-2222

If you do not find a profile matching the one you wish to create then click Continue with New Profile.

**Step 6g:** Click **Add** to add a new phone number.

NOTE: You may add, edit, and delete multiple phone numbers using the wizard.

**Person Profile** Step 2 of 4

You may add, edit and delete multiple phone numbers using this wizard. When you are completed click the Continue button.

Phone numbers for **John Smith**

Phone Numbers	
<input type="button" value="+ Add"/>	
Type	Number
No Records Found	



**Step 6h:** Enter the *Phone Type* and *Phone Number*. If known, provide the *Extension*.

Enter the new phone number and click the Save button.

Phone Type: Home ▾

Phone Number:

Extension:

Save Cancel

**Step 6i:** Click **Continue**.

Continue - Please continue the wizard.

Cancel - Please exit the wizard.

← Previous Cancel Continue →

**Step 6j:** Click **Add** to add an address.

Addresses for **John Smith**

Addresses (+ Add)

Type	Address
No Records Found	

**Step 6k:** Enter the new address.

Type: Home ▾  
Address:   
  
City:   
State: Illinois ▾  
Zip:  -   
Save Cancel

**Step 6l:** Click the **Save** button.

Type: Home ▾  
Address:   
  
City:   
State: Illinois ▾  
Zip:  -   
Save Cancel

**Step 6m:** Click **Continue**.

Addresses for **John Smith**

Addresses ( + Add)

Edit	Delete	Type	Address
		Home	00 Harrisburg, IL 62946

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

Previous Cancel **Continue**

**Step 6n:** To add *Languages*, click **Add**.

Person Profile Step 4 of 4

You may add, edit and delete multiple languages for this person using this wizard.

Languages (+ Add)	
Language	Primary?
No Records Found	

← Previous Save →

**Step 6o:** Select the *Language* and indicate if it is the *Primary* language.

Select the Language and indicate if it is the Primary Language and click the Save button.

Language:

Primary?:

Note: Check this box if this is the Primary Language.

**Step 6p:** Click **Save**.

Select the Language and indicate if it is the Primary Language and click the Save button.

Language:

Primary?:

**Step 6q:** When complete, click **Save**.

**Person Profile** Step 4 of 4

You may add, edit and delete multiple languages for this person using this wizard.

Languages (+ Add)			
Edit	Delete	Language	Primary?
		English	True

← Previous ⊘ Cancel Save →

**Step 7:** Click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

NOTE: Clicking the **Save Now** radio button will allow you to save your work as you go.

← Previous ⊘ Cancel  Save Now Continue →

**Step 8:** Enter the reason for the request for an evaluation.

The request for an evaluation was made for the following reasons:

**Request for Evaluation**

Select one

A review of the request has determined that an evaluation **is deemed necessary** at this time.

A review of the request has determined that an evaluation **is not deemed necessary** at this time.

The reasons and relevant factors for the above indicated decision include:

**Explanation of Procedural Safeguards**

Select one

The parent(s)/guardian(s) **did receive** a copy of the **Explanation of Procedural Safeguards**.

The parent(s)/guardian(s) **did not receive** a copy of the **Explanation of Procedural Safeguards**.

**Step 9:** Select the *Request for Evaluation*.

Request for Evaluation	
Select one	
<input checked="" type="radio"/>	A review of the request has determined that an evaluation <b>is deemed necessary</b> at this time.
<input type="radio"/>	A review of the request has determined that an evaluation <b>is not deemed necessary</b> at this time.

**Step 10:** Enter *The reasons and relevant factors for the above indicated decision*.

The reasons and relevant factors for the above indicated decision include:

**Step 11:** Select the correct *Explanation of Procedural Safeguards*.

Explanation of Procedural Safeguards	
Select one	
<input checked="" type="radio"/>	The parent(s)/guardian(s) <b>did receive</b> a copy of the <b>Explanation of Procedural Safeguards</b> .
<input type="radio"/>	The parent(s)/guardian(s) <b>did not receive</b> a copy of the <b>Explanation of Procedural Safeguards</b> .

**Step 12:** Click **Continue**.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

NOTE: Clicking the **Save Now** radio button will allow you to save your work as you go.

[← Previous](#) [Cancel](#) [Save Now](#) [Continue →](#)

**Step 13:** Modify, add, edit, and/or delete the *Form Contact List*. For Instructions See [IEP Form Contacts](#).

Decision Regarding a Request for an Evaluation				Step 3 of 3	
You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header.					
Form Contact List ( <a href="#">X Modify</a> ) ( <a href="#">Clear</a> )					
Contact	Sincerely	Personnel	Title(s)	Type	Phone(s)
<input checked="" type="radio"/>	<input checked="" type="radio"/>	DemoPaloma Allen	<a href="#">Title (Modify)</a> General Education Teacher	Work	<a href="#">Number (Modify)</a> (618) 272-7470 Ext. 123

**Step 14:** When complete, click **Save**.



The image shows a horizontal navigation bar for a wizard. It is divided into two sections: a light blue top section and a darker blue bottom section. In the top section, there are two radio buttons. The first is selected and has a red box around it; its text is "Save - Please save the form information.". The second is unselected; its text is "Cancel - Please exit the wizard.". In the bottom section, there are three buttons: "Previous" with a left-pointing blue arrow, "Cancel" with a greyed-out icon of a circle with a diagonal line, and "Save" with a right-pointing blue arrow. The "Save" button has a red box around it.

Save - Please save the form information.  
 Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save →](#)

# Consent for Initial Evaluation

**Step 1:** Under the *Notice and Consent Forms* tab, select **Consent for Initial Evaluation** form.

The screenshot shows a web interface with four tabs: 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Notice and Consent Forms' tab is active. Below the tabs is a table titled 'Select the Form' with two columns: 'IEP Forms' and 'Name'. The 'Consent for Initial Evaluation' form is highlighted with a red box.

IEP Forms	Name
Request for an Evaluation	Form 34-57A
<b>Consent for Initial Evaluation</b>	Form 34-57B
Consent for Reevaluation	Form 34-57C
Notification of Conference	Form 34-57D
Notification of Conference Recommendations	Form 34-57E
Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
Notification of IEP Amendment	Form 34-57G
Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
Delegation of Rights to Make Educational Decisions	Form 34-57K
Consent For Outside Agency Invitation	Form 34-57L
Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** Enter the *Form Date*.

The screenshot shows a form titled 'Identification of Needed Assessments'. At the top, there is a 'Form Date:' field with a dropdown menu and a red box around it, followed by a '\* MM/DD/YYYY' label. Below this is a table with five columns: 'Domain Type', 'Relevant', 'Existing information about the child', 'Additional evaluation data needed', and 'Sources from which data will be obtained'. The 'Relevant' column contains radio buttons for 'Yes' and 'No' for each domain type.

Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	Yes <input type="radio"/> No <input type="radio"/>			
Functional Performance	Yes <input type="radio"/> No <input type="radio"/>			
Cognitive Functioning	Yes <input type="radio"/> No <input type="radio"/>			
Communication Status	Yes <input type="radio"/> No <input type="radio"/>			
Health	Yes <input type="radio"/> No <input type="radio"/>			
Hearing / Vision	Yes <input type="radio"/> No <input type="radio"/>			
Motor Abilities	Yes <input type="radio"/> No <input type="radio"/>			
Social / Emotional Status	Yes <input type="radio"/> No <input type="radio"/>			

**Step 3:** For each *Domain Type*, determine if the domain is relevant or not relevant by selecting *Yes* or *No* located under the *Relevant* column.

NOTE: All domains must be marked as relevant or not relevant and no boxes should be left blank.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			



**Step 4:** Enter the *Existing information about the child* for each *Domain Type*.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 5:** Enter any *Additional evaluation data needed* for each *Domain Type*.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 6:** Enter the *Sources from which data will be obtained* for each *Domain Type*.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 7:** When complete, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

# Consent for Reevaluation

**Step 1:** Under the *Notice and Consent Forms* tab, select **Consent for Reevaluation** form.

The screenshot shows a software interface with four tabs: 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Notice and Consent Forms' tab is active. Below the tabs is a table titled 'Select the Form' with three columns: 'Started', 'IEP Forms', and 'Name'. The 'Consent for Reevaluation' row is highlighted with a red border.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** Enter the *Form Date*.

The screenshot shows a form titled 'Identification of Needed Assessments'. At the top, there is a 'Form Date' field with a dropdown arrow and a red box around it, followed by the text 'MM/DD/YYYY'. Below this is a table with five columns: 'Domain Type', 'Relevant', 'Existing information about the child', 'Additional evaluation data needed', and 'Sources from which data will be obtained'. Each row in the table has radio buttons for 'Yes' and 'No' in the 'Relevant' column.

Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 3:** For each *Domain Type*, determine if the domain is relevant or not relevant by selecting *Yes* or *No* located under the *Relevant* column.

NOTE: All domains must be marked as relevant or not relevant and no boxes should be left blank.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 4:** Enter the *Existing information about the child* for each *Domain Type*.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 5:** Enter any *Additional evaluation data needed* for each *Domain Type*.

Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			

**Step 6:** Enter the *Sources from which data will be obtained* for each *Domain Type*.

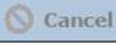
Identification of Needed Assessments				
Domain Type	Relevant	Existing information about the child	Additional evaluation data needed	Sources from which data will be obtained
Academic Achievement	<input type="radio"/> Yes <input type="radio"/> No			
Functional Performance	<input type="radio"/> Yes <input type="radio"/> No			
Cognitive Functioning	<input type="radio"/> Yes <input type="radio"/> No			
Communication Status	<input type="radio"/> Yes <input type="radio"/> No			
Health	<input type="radio"/> Yes <input type="radio"/> No			
Hearing / Vision	<input type="radio"/> Yes <input type="radio"/> No			
Motor Abilities	<input type="radio"/> Yes <input type="radio"/> No			
Social / Emotional Status	<input type="radio"/> Yes <input type="radio"/> No			


**Step 7:** When complete, click **Save**.



Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

 Cancel

 Save Now

 Save 

# Notification of Conference

To begin the IEP process, you will need to *Setup a Conference*. These steps will guide you through the wizard to *Setup a Conference*, which will create the *Notification of Conference* and *Conference Summary*.

**Step 1:** From the **Landing Page**, click on a student in your case load for whom you would like to create an IEP.



**Step 2:** On the **Student Profile** page click **Current/Create IEP**.



**Step 3:** Enter a *Purpose of Visit* and click **Save**.



**Step 4:** This will open to the *IEP Overview* tab. Click **Setup a Conference**.

The screenshot shows the 'IEP Overview' tab for a student named DemoMckenzie Magda Watson. The student's SIS ID is 999999081 and their DOB is 4/7/2002 (16 yrs 0 mo). The 'Setup a Conference' button is highlighted with a red box. Below the button, the IEP status is 'Draft' and the resident district is 'Harrisburg CUSD 3'.

**Step 5:** Enter the *Form Date*.

The screenshot shows the 'Purpose of Conference' form. The 'Form Date' field is highlighted with a red box and contains a date picker. Below the date field is a table with columns 'Select' and 'Purpose'. The table lists various conference purposes, each with a checkbox in the 'Select' column.

Select	Purpose
<input type="checkbox"/>	<b>Review of Existing Data</b> - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
<input type="checkbox"/>	<b>Initial Evaluation/Eligibility</b> - Review your child's recent evaluation to determine initial eligibility for special education and related services.
<input type="checkbox"/>	<b>Reevaluation</b> - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
<input type="checkbox"/>	<b>Initial IEP</b> - Review your child's need for special education and related services and placement and develop an initial IEP.
<input type="checkbox"/>	<b>IEP Review and Revision</b> - Review and/or revise your child's IEP to determine special education and related services and placement.
<input type="checkbox"/>	<b>Secondary Transition</b> - Consider postsecondary goals and transition services (beginning at age 14 1/2).
<input type="checkbox"/>	<b>FBA/BIP</b> - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
<input type="checkbox"/>	<b>MDR</b> - Consider relatedness of your child's disability to a disciplinary code violation(s).
<input type="checkbox"/>	<b>Graduation</b> - Review your child's anticipated date of graduation.
<input type="checkbox"/>	<b>Other</b> - (e.g. Termination of Placement, Aging Out) :

**Step 6:** Select the *Purpose of Conference*.

The screenshot shows the 'Purpose of Conference' form. The 'Select' column is highlighted with a red oval, indicating that the user is selecting a purpose for the conference.



**Step 7:** Click **Continue**.



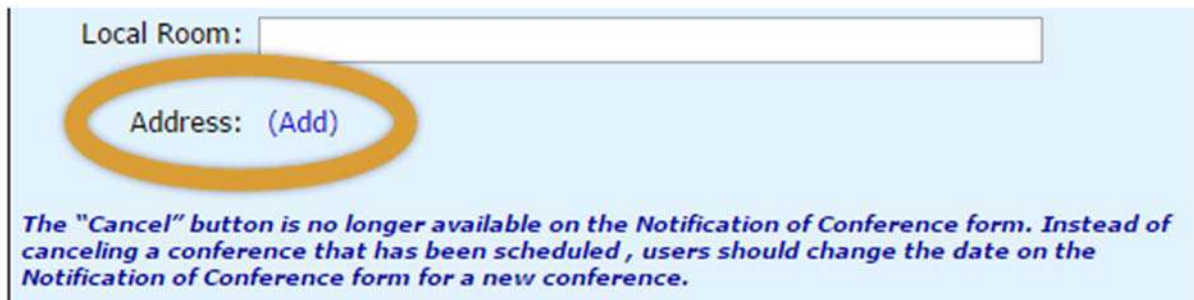
Wizard navigation bar with two radio buttons: "Continue - Please continue the wizard." (selected) and "Cancel - Please exit the wizard." Below the buttons are "Cancel" and "Continue" buttons. The "Continue" button is circled in red.

**Step 8:** Enter information regarding the time and place of the conference.



Conference details form with fields for Subject, Date, Time, and Details. A yellow callout box contains the text: "NOTE: This field will automatically populate from the selected 'Purpose of Conference'." The Details field contains the text: "Review the child's need for special education and related services and placement and develop an initial IEP."

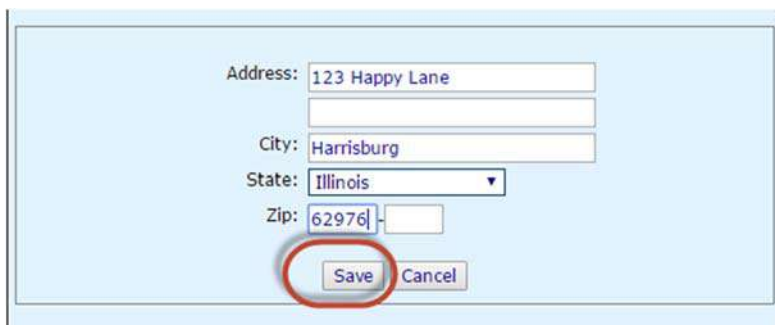
**Step 9:** To add an *Address*, click **Add**.



Local Room: [text box]  
Address: (Add) [button highlighted with orange circle]

*The "Cancel" button is no longer available on the Notification of Conference form. Instead of canceling a conference that has been scheduled, users should change the date on the Notification of Conference form for a new conference.*

**Step 10:** Enter the *Address*, *City*, *State*, *Zip*, and click **Save**.



Address form with fields for Address, City, State, and Zip. The "Save" button is circled in red.

Address: 123 Happy Lane  
City: Harrisburg  
State: Illinois  
Zip: 62976

**Step 11:** When finished, click **Continue**.

A screenshot of a wizard interface. At the top, there are three radio buttons: "Continue - Please continue the wizard." (selected), "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard." Below the radio buttons is a navigation bar with three buttons: "Previous" (with a left arrow), "Cancel" (with a crossed-out circle), and "Continue" (with a right arrow). Red circles highlight the selected radio button and the "Continue" button.

**Step 12:** Add or edit the parent/guardian(s) for this student if you have not already done so on the student's profile page. See [Parents/Guardians](#) for instructions.

A screenshot of a form. At the top, there is a link "Click Here to Add meeting notes" with a dropdown arrow. Below it is a dark blue bar with the text "Current Parent/Guardian(s)" and a red-bordered "Add" button with a plus sign. A yellow callout box with a note points to the "Add" button. The note says: "NOTE: Click the drop-down arrows to Add meeting notes".

**Step 13:** When complete, click **Continue**.

A screenshot of a wizard interface, similar to Step 11. It has three radio buttons: "Continue - Please continue the wizard." (selected), "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard." Below is a navigation bar with "Previous", "Cancel", and "Continue" buttons. Red circles highlight the selected radio button and the "Continue" button.

**Step 14:** Click **Add** to set up *Conference Attendees* if you have not already done so.

A screenshot of a table titled "Conference Attendees" with an "Add" button. The table has columns: "Remove/Excuse", "Contact Attempts", "Name", "Type", "Excused", "Interpreter Needed", and "Languages". There are two rows of data. The first row is for "Kenzie Schmitt" (Parent) with "English" listed as a language. The second row is for "Train09Olivia Gray" with "No Records Found" listed as a language. A red box highlights the "Add" button.

Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages
✗	None listed.	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English <input type="checkbox"/> Primary? <input checked="" type="checkbox"/>
✗		Train09Olivia Gray		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found <input type="checkbox"/> Primary? <input type="checkbox"/>

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 15:** Here you will be able to add the student as a conference attendee or *Search for Conference Attendee*.

**IEP Conference Setup** Step 4 of 7

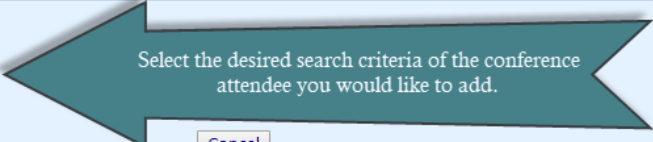
You are setting up attendees for this conference. Guardians and IEP team members are required to attend. You may Remove or Excuse any attendee and fill out an excusal form as necessary. You may also search for and add any new attendees. [Help](#)

*This information will be saved when you click Continue at the bottom of the wizard.*

[Click Here to Add meeting notes](#)

**Search for Conference Attendee**

- Add Meeyah Reigh Ann Adams
- Search for School Personnel.
- Search for Other Individual.
- Add Unknown Person by Title.



Select the desired search criteria of the conference attendee you would like to add.

**NOTE:** If you choose to add conference attendees using the personnel search, you will be able to add multiple staff to the conference at once. To add multiple staff, click the check box located under the *Multi Select* column. Once you have selected the desired conference attendees from the *Personnel Search Results* grid, click the **Use Selected** button to add the attendees.

[Click Here to Add meeting notes](#)

**Personnel Search**

Multiple OR Single

District:  IEIN:

Last Name:

First Name:

Gender:

Include Retired

Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

**Personnel Search Results**

Multi Select All / None	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input type="checkbox"/>	9000028	DemoAngie D Baker	Female	White, Non-Hispanic	Wabash & Ohio Valley Sp Ed Dist		
<input type="checkbox"/>	9000034	DemoMarisa Bell	Female	Native Hawaiian or Other Pacific Islander	Wabash & Ohio Valley Sp Ed Dist		
<input type="checkbox"/>	9000024	DemoReina Brooks	Female	White, Non-Hispanic	Wabash & Ohio Valley Sp Ed Dist		
<input type="checkbox"/>	9000165	Train15Jess Brown	Female	Native Hawaiian or Other Pacific Islander	Wabash & Ohio Valley Sp Ed Dist		

**Step 16:** To log *Contact Attempts*, click the pencil.

[Click Here to Add meeting notes](#)

Conference Attendees ( <a href="#">Add</a> )								
Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages		
<input checked="" type="checkbox"/>	<input type="text" value="None listed."/>	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th>Primary?</th></tr></thead><tbody><tr><td>English <input checked="" type="checkbox"/></td></tr></tbody></table>	Primary?	English <input checked="" type="checkbox"/>
Primary?								
English <input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/>		Train09Olivia Gray	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th>Primary?</th></tr></thead><tbody><tr><td>No Records Found <input type="checkbox"/></td></tr></tbody></table>	Primary?	No Records Found <input type="checkbox"/>
Primary?								
No Records Found <input type="checkbox"/>								

*Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.*

**Step 17:** Enter all attempts to contact the guardian.

Guardian Name: **Kenzie Schmitt**

Please enter all attempts to contact this guardian below.

Show these contact attempts on Conference Summary Report for this guardian

**Apply these contact attempts to the following guardians as well.**

Selected	Guardian Name
<input type="checkbox"/>	John Smithc

**Step 18:** To apply attempts to other guardian(s) listed below, click the box under the *Selected* column and click **Save**.

Guardian Name: **Kenzie Schmitt**

Please enter all attempts to contact this guardian below.

Show these contact attempts on Conference Summary Report for this guardian

**Apply these contact attempts to the following guardians as well.**

Selected	Guardian Name
<input type="checkbox"/>	John Smithc

Save - Please save the attempts to contact the parent/guardian.  
 Cancel - Please exit the wizard.

Cancel
 Save

**Step 19:** To *Remove/Excuse* an attendee, click the **Red X**.

[Click Here to Add meeting notes](#)

Conference Attendees (  Add)										
Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages				
	None listed.	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"> <thead> <tr> <th>Language</th> <th>Primary?</th> </tr> </thead> <tbody> <tr> <td>English</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Language	Primary?	English	<input checked="" type="checkbox"/>
Language	Primary?									
English	<input checked="" type="checkbox"/>									
		Train09Olivia Gray		<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"> <thead> <tr> <th>Language</th> <th>Primary?</th> </tr> </thead> <tbody> <tr> <td>No Records Found</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>	Language	Primary?	No Records Found	<input type="checkbox"/>
Language	Primary?									
No Records Found	<input type="checkbox"/>									

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 20:** Decide if an official excusal needs to be sent to the parent/guardian and answer appropriately.

**Attendee Excusal**

You have chosen to excuse an attendee from this meeting.

Does this excusal need an official excusal form to be sent to the parent/guardian?

**Step 21:** If yes, enter *all attempts to contact this guardian* below, check the boxes that apply, and click **Remove Excusal**.

Guardian Name: **Kenzie Schmitt**

Please enter all attempts to contact this guardian below.

Show these contact attempts on Conference Summary Report for this guardian

**Apply these contact attempts to the following guardians as well.**

Selected	Guardian Name
<input checked="" type="checkbox"/>	John Smithc

You may remove the excusal from this conference for the guardian by clicking the Remove Excusal button below and then clicking Submit.

**Step 22:** When complete, click **Save**.



A dialog box with a light blue background. At the top, there are two radio buttons: the first is selected and labeled "Save - Please save this team member excusal," and the second is labeled "Cancel - Please exit the wizard." Below the radio buttons, there are two buttons: "Cancel" on the left and "Save" with a right-pointing arrow on the right. Both the "Save" radio button and the "Save" button are circled in red.

**Step 23:** To edit attendee roles under *Type* column, click the pencil.



Conference Attendees (Add)

Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages				
<input type="checkbox"/>	None listed.	Kenzie Schmitt	Parent	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th></th><th>Primary?</th></tr></thead><tbody><tr><td>English</td><td><input checked="" type="checkbox"/></td></tr></tbody></table>		Primary?	English	<input checked="" type="checkbox"/>
	Primary?									
English	<input checked="" type="checkbox"/>									
<input type="checkbox"/>		Train09Olivia Gray	<input type="text" value="Pencil icon"/>	<input type="checkbox"/>	<input type="checkbox"/>	<table border="1"><thead><tr><th></th><th>Primary?</th></tr></thead><tbody><tr><td>No Records Found</td><td><input type="checkbox"/></td></tr></tbody></table>		Primary?	No Records Found	<input type="checkbox"/>
	Primary?									
No Records Found	<input type="checkbox"/>									

Note: Returning to the previous page will cause any changes made to the Conference Attendees to be lost.

**Step 24:** Select desired role for the attendee, then click **Save**.



Roles

Selected	Role
<input type="checkbox"/>	Assistant Principal
<input type="checkbox"/>	Bilingual Specialist
<input type="checkbox"/>	Case Manager
<input type="checkbox"/>	Director of Special Education - Cooperative
<input type="checkbox"/>	Director of Special Education - District
<input type="checkbox"/>	General Education Teacher
<input type="checkbox"/>	Guidance Counselor
<input type="checkbox"/>	Interpreter
<input type="checkbox"/>	LEA Representative
<input type="checkbox"/>	Occupational Therapist
<input type="checkbox"/>	Paraprofessional/Teacher Aide
<input type="checkbox"/>	Physical Therapist
<input type="checkbox"/>	Principal
<input type="checkbox"/>	School Nurse
<input type="checkbox"/>	School Psychologist
<input type="checkbox"/>	School Psychologist Intern
<input type="checkbox"/>	School Social Worker
<input type="checkbox"/>	School Social Worker Intern
<input type="checkbox"/>	Special Education Teacher
<input type="checkbox"/>	Special Education Coordinator/Supervisor
<input type="checkbox"/>	Special Education Department Head
<input type="checkbox"/>	Speech & Language Pathologist
<input type="checkbox"/>	Student Teacher
<input type="checkbox"/>	Superintendent
<input type="checkbox"/>	Other: <input type="text"/>

Save Cancel

**Step 25:** When complete, click **Continue**.

A horizontal navigation bar with a light blue background. On the left, there is a blue arrow pointing left and the text "Previous". In the center, there is a grey circle with a diagonal line and the text "Cancel". On the right, there is a blue arrow pointing right and the text "Continue". The "Continue" button and the "Continue - Please continue the wizard." radio button above it are circled in red.

**Step 26:** Enter *Dates of Most Recent Evaluation*, and *Date of Next Reevaluation*, if known.

A section titled "Conference Information" with a dark blue header. Below the header, there is a paragraph of text: "These dates are determined from the date on official eligibility forms if any or from the date provided by you in the process of entering disabilities without having to do the eligibility forms." Below this text are two date input fields. The first is labeled "Date of Most Recent Evaluation:" and the second is labeled "Date of Next ReEvaluation:". Both fields have a dropdown arrow and "MM/DD/YYYY" next to them. The entire input area is circled in red.

**Step 27:** Enter the *Anticipated Date of High School Graduation*, if known. If student has a *Medicaid Number*, enter it here.

A section titled "Student Information" with a dark blue header. Below the header, there are two input fields. The first is labeled "Anticipated Date of High School Graduation:" and has a dropdown arrow and "MM/DD/YYYY" next to it. The second is labeled "Medicaid Number:" and is a simple text input field. The date field is circled in red.

**Step 28:** Enter information on *Procedural Safeguards*.

A section titled "Procedural Safeguards" with a dark blue header. Below the header, there is a paragraph of text: "Explanation of Procedural Safeguards were provided to/reviewed with the parent(s) on: [date field] MM/DD/YYYY". To the right of this text is a link: "[Procedural Safeguard Form](#)". Below this are several radio buttons and checkboxes. The "NA" radio button is selected. A yellow callout bubble with a speech bubble tail points to the link and contains the text: "NOTE: Click here to view the Procedural Safeguard Form".

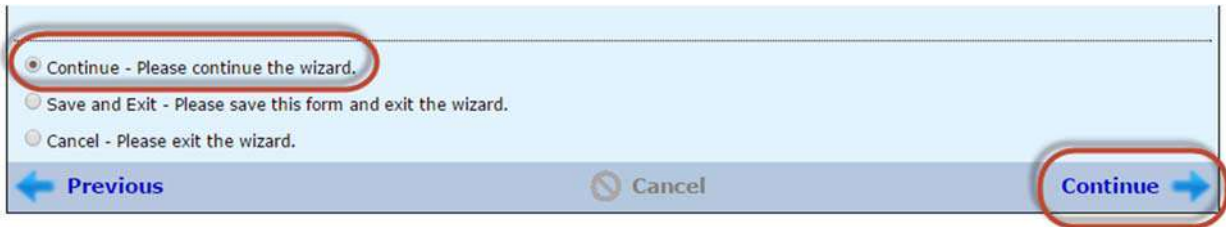
**Step 29:** Placement is populated by *Educational Placement and Services* automatically.

Placement is read-only in this location. Placement will be considered as a part of Form 34-54 Q, Educational Services and Placement.

Placement	
FTE	Serving School/Facility
1.0000	Harrisburg CUSD 3



**Step 30:** When complete, Click **Continue**.



A horizontal navigation bar with a light blue background. It contains three radio button options: "Continue - Please continue the wizard." (selected), "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard." Below the options are three buttons: "Previous" with a left arrow, "Cancel" with a crossed-out circle, and "Continue" with a right arrow. Red boxes highlight the selected radio button and the "Continue" button.

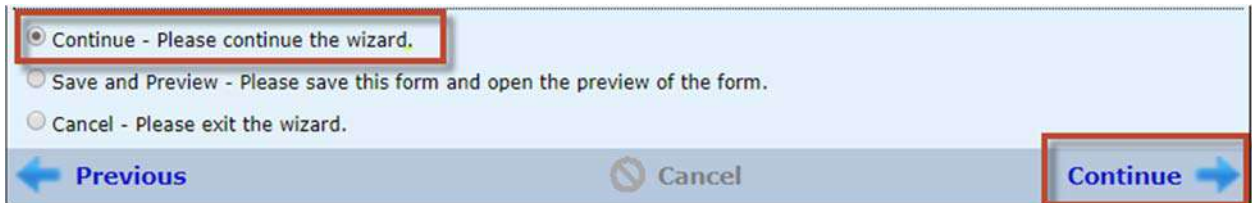
**Step 31:** To verify, modify, and/or add to the *Default Contact List*, see **IEP Form Contacts** for instructions.



Click Here to Add meeting notes

Form Contact List (X Modify) (Clear)					
Contact	Sincerely	Personnel	Title(s)		Phone(s)
<input checked="" type="radio"/>	<input type="radio"/>	Allen, DemoPaloma	<b>Title</b> (Modify)	<b>Type</b>	<b>Number</b> (Modify)
			Director of Special Education - District	Work	(618) 272-7470 Ext. 123
<input type="radio"/>	<input checked="" type="radio"/>	Thomas, DemoLynda	<b>Title</b> (Modify)	<b>Type</b>	<b>Number</b> (Modify)
			No Records Found	No Records Found	

**Step 32:** After completing the *Default Contact List*, click **Continue**.



A horizontal navigation bar with a light blue background. It contains three radio button options: "Continue - Please continue the wizard." (selected), "Save and Preview - Please save this form and open the preview of the form.", and "Cancel - Please exit the wizard." Below the options are three buttons: "Previous" with a left arrow, "Cancel" with a crossed-out circle, and "Continue" with a right arrow. Red boxes highlight the selected radio button and the "Continue" button.

**Step 33:** Click the box of the forms you would like to add to the conference from the *IEP Forms*, *Notice and Consent Forms*, *Eligibility Forms*, and *Other Forms* tab.

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Data Chart	Form 34-54F
<input type="checkbox"/>	Present Levels of Academic Achievement and Functional Performance	Form 34-54G
<input type="checkbox"/>	Secondary Transition	Form 34-54H-I
<input type="checkbox"/>	Functional Behavioral Assessment	Form 34-54J
<input type="checkbox"/>	Behavioral Intervention Plan	Form 34-54K-L
<input type="checkbox"/>	Goals and Objectives	Form 34-54M
<input type="checkbox"/>	Educational Accommodations and Support	Form 34-54N
<input type="checkbox"/>	Assessment	Form 34-54O
<input type="checkbox"/>	Educational Services and Placement	Form 34-54P
<input type="checkbox"/>	Educational Services and Placement (Page 2)	Form 34-54Q
<input type="checkbox"/>	Manifestation Determination	Form 34-54R
<input type="checkbox"/>	Additional Notes/Information	Form 34-54S

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Notification of Conference Recommendations	Form 34-57E
<input type="checkbox"/>	Consent For Outside Agency Invitation	Form 34-57L

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Documentation of Evaluation Results	Form 34-54A
<input type="checkbox"/>	Eligibility Determination (Other than SLD)	Form 34-54B
<input type="checkbox"/>	Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
<input type="checkbox"/>	Eligibility Determination (SLD)	Form 34-54D-E

Click Here to Add meeting notes

IEP Forms Notice and Consent Forms Eligibility Forms Other Forms

Select the Form		
Started	IEP Forms	Name
<input type="checkbox"/>	Autism Considerations	Form 34-54V
<input type="checkbox"/>	Summary of Performance	Form 34-60

**Step 34:** When complete, click **Save**.



**Step 35:** I-Star will then open to the *IEP Overview* page. To view the IEP you created, select the **IEP Timeline** tab.



**Step 36:** Click the double vertical row arrows to expand the forms associated with the conference.



# Notification of Conference Recommendations

**Step 1:** From the *Notice and Consent Forms* tab, select the **Notification of Conference Recommendations** form.



**Step 2:** Enter the *Form Date*.



**Step 3:** You must assign this documentation to a meeting by either creating a new meeting or assigning it to an existing meeting. To extend the search criteria, click the drop-down list below.



**Step 3a:** This will populate the past meetings. To select a past meeting, click the button located under the *Select* column.



**Step 4:** If you are creating a new meeting, click **Add**.

Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than  old

Select a meeting **Add**

**Step 4a:** To set up a conference, click **Create an IEP** and follow steps 5-33.

Form Date: // = MM/DD/YYYY

Select	Purpose
<input type="checkbox"/>	<b>Review of Existing Data</b> - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
<input type="checkbox"/>	<b>Initial Evaluation/Eligibility</b> - Review your child's recent evaluation to determine initial eligibility for special education and related services.
<input type="checkbox"/>	<b>Reevaluation</b> - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
<input type="checkbox"/>	<b>Initial IEP</b> - Review your child's need for special education and related services and placement and develop an initial IEP.
<input type="checkbox"/>	<b>IEP Review and Revision</b> - Review and/or revise your child's IEP to determine special education and related services and placement.
<input type="checkbox"/>	<b>Secondary Transition</b> - Consider postsecondary goals and transition services (beginning at age 14 1/2).
<input type="checkbox"/>	<b>FBA/BIP</b> - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
<input type="checkbox"/>	<b>MDR</b> - Consider relatedness of your child's disability to a disciplinary code violation(s).
<input type="checkbox"/>	<b>Graduation</b> - Review your child's anticipated date of graduation.
<input type="checkbox"/>	<b>Other</b> - (e.g. Termination of Placement, Aging Out) :

Purpose of Conference (Clear)

**Step 5:** Once a meeting has been selected, click **Continue**.

[Click Here to Add meeting notes](#)

Select	First Meeting Date	Subject
<input checked="" type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than  old

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

**Step 6:** Select the *Conference Determination*.

Conference Determination (Clear)	
Relevant	Relevant
<input type="checkbox"/>	Is eligible for special education and related services under the category of:
<input type="checkbox"/>	Is not eligible for special education and related services.
<input type="checkbox"/>	Will receive the special education and related services as listed in the IEP.
<input type="checkbox"/>	Requires and will receive the postsecondary goals and transition services (beginning at age 14 1/2) as listed in the IEP.
<input type="checkbox"/>	Requires and will receive a functional behavioral assessment and behavioral intervention plan.
<input type="checkbox"/>	Was determined that the disciplinary code violation(s) <b>was</b> related to your child's disability.
<input type="checkbox"/>	Was determined that the disciplinary code violation(s) <b>was not</b> related to your child's disability.
<input type="checkbox"/>	Is recommended for graduation.
<input type="checkbox"/>	Other (e.g. Termination of Placement, Aging Out):

**Step 7:** Here you can modify, add, edit, and/or delete the *Form Contact List*. For Instructions See [IEP Form Contacts](#) steps 2-15.

Form Contact List (Modify) (Clear)					
Contact	Sincerely	Personnel	Title(s)	Type	Phone(s)
<input checked="" type="radio"/>	<input checked="" type="radio"/>	DemoPaloma Allen	Title (Modify) General Education Teacher	Work	Number (Modify) (618) 272-7470 Ext. 123

NOTE: To clear the *Form Contact List*, click **Clear**.

Form Contact List (Modify) (Clear)	
Contact	Sincerely
<input type="radio"/>	<input type="radio"/>

**Step 8:** When complete, click **Save**.

<input checked="" type="radio"/> Save - Please save this form.	<input type="radio"/> Save and Preview - Please save this form and open the preview of the form.	<input type="radio"/> Cancel - Please exit the wizard.
<a href="#">← Previous</a>	<a href="#">Cancel</a>	<a href="#">Save Now</a> <a href="#">Save →</a>

## Consent for Initial Provisions of Sp Ed. & Related Services

**Step 1:** Under the *Notice and Consent Forms* tab, select **Consent for Initial Provisions of Spec. Ed. and Related Services** form.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	<b>Consent for Initial Provisions of Spec. Ed. and Related Services</b>	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** Enter the *Form Date*.

**Consent for Initial Provisions and Related Services** Step 1 of 2

You are sending a consent for initial special education and related services form to the parent(s)/guardian(s). If the parent(s)/guardian(s) have completed and returned this form, please update their response. [Help](#)


Form Date:  \* MM/DD/YYYY

**Step 3:** When complete, click **Continue**.

Continue - Please continue the wizard.

Cancel - Please exit the wizard.

**Step 4:** Here you can modify, add, edit, and/or delete the *Form Contact List*. For Instructions See **IEP Form Contacts** steps 2-15.

Form Contact List  (Clear)					
Contact	Sincerely	Personnel	Title	Type	Phone(s)
<input type="radio"/>	<input type="radio"/>	DemoPaloma Allen	<small>(Modify)</small> General Education Teacher	Work	<small>(Modify)</small> (618) 272-7470 Ext. 123

**Step 5:** Click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save →](#)



# Notification of IEP Amendment

**Step 1:** Under the *Notice and Consent Forms* tab, select **Notification of IEP Amendment** form.

NOTE: You can only use this option if an official IEP already exists in I-Star.



**Step 2:** Enter the *Form Date*.

**IEP Amendment**
Step 1 of 5

Please add the personnel that had contact with the parent/guardian. [Help](#)

This information will be saved when you click Continue at the bottom of the wizard.

Form Date:  = MM/DD/YYYY

**Personnel That Spoke to the Parent/Guardian** (+ Add)

Delete	Personnel
No Records Found	

You may select personnel from the access list listing below. If a person not listed in the access list spoke to the parent/guardian you may click the Add link above to search for that personnel.

**Access List**

Select	Name	Entity	Title	Interpreter	Read-Only	Notifications
✓	Train09Olivia Gray	Harrisburg CUSD 3		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
✓	Train15Jess Brown	Norris City Annex		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 3:** You may select the check-mark from the access list below or if a person is not listed in the access list that spoke to the parent/guardian you may click **Add**.

Form Date:  MM/DD/YYYY

**Personnel That Spoke to the Parent/Guardian** [Add](#)

Delete	Personnel
No Records Found	

You may select personnel from the access list listing below. If a person not listed in the access list spoke to the parent/guardian you may click the Add link above to search for that personnel.

**Access List**

Select	Name	Entity	Title	Interpreter	Read-Only	Notifications
<input checked="" type="checkbox"/>	Train09Olivia Gray	Harrisburg CUSD 3		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Train15Jess Brown	Norris City Annex		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

NOTE: If you have clicked the **Add** icon, follow steps 3a-3d.

**Step 3a:** Use the *Personnel Search* to find the personnel who spoke with the parent.

**Personnel Search**

Multiple	OR	Single
District: <input type="text"/>		IEIN: <input type="text"/>
Last Name: <input type="text"/>		SSN: <input type="text"/>
First Name: <input type="text"/>		
Gender: <input type="text"/>		
Include Retired <input type="checkbox"/>		
<input type="button" value="Search"/> <input type="button" value="Clear Search"/> <input type="button" value="Cancel"/>		
<small>Note: You must supply District, IEIN or SSN to search for teachers that you have never created an approval record for in the past.</small>		

**Step 3b:** If the personnel for whom you are searching appears in the *Personnel Search Results*, click the check-mark under *Select* to select them.




The screenshot shows the 'Personnel Search' interface. At the top, there are two tabs: 'Multiple' and 'Single'. The 'Multiple' tab is selected, showing a 'District' dropdown menu with 'Wabash & Ohio Valley Sp Ed Dist' selected. Below this are input fields for 'Last Name', 'First Name', and 'Gender'. There is also an 'Include Retired' checkbox. The 'Single' tab shows an 'IEIN' input field with '9000162' entered. At the bottom of the search form are 'Search', 'Clear Search', and 'Cancel' buttons. A note below the search form reads: 'Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.'

Below the search form is the 'Personnel Search Results' table:

Select	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input checked="" type="checkbox"/>	9000162	Train12Baylee E Lopez	Female	White, Non-Hispanic			

**Step 3c:** If the person has already been added to the student's *Access List*, you can simply click the check-mark under *Select* column to add them.



The screenshot shows the 'Personnel That Spoke to the Parent/Guardian (+ Add)' section. It contains a table with a 'Delete' column and a 'Personnel' column. Two rows are listed: 'Train12Baylee E Lopez' and 'Train09Olivia Gray', both with a red 'X' in the 'Delete' column. Below this table is a text instruction: 'You may select personnel from the access list listing below. If a person not listed in the access list spoke to the parent/guardian you may click the Add link above to search for that personnel.' Below the instruction is the 'Access List' table:

Select	Name	Entity	Title	Interpreter	Read-Only	Notifications
<input checked="" type="checkbox"/>	Train09Olivia Gray	Harrisburg CUSD 3		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Train15Jess Brown	Norris City Annex		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

An orange arrow points from the 'Train09Olivia Gray' row in the 'Personnel' table to the 'Train09Olivia Gray' row in the 'Access List' table.

**Step 3d:** Once you have added the personnel that you need, click **Continue**.



The screenshot shows a wizard navigation screen with three radio button options:

- Continue - Please continue the wizard.
- Save and Exit - Please save this form and exit the wizard.
- Cancel - Please exit the wizard.

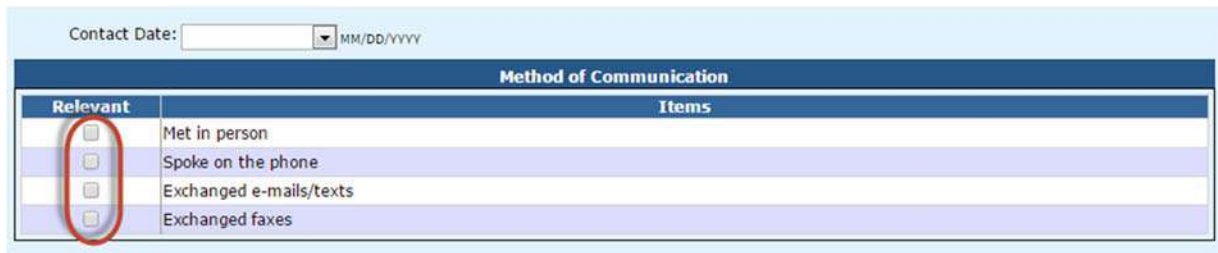
At the bottom of the screen, there are two buttons: 'Cancel' and 'Continue'. The 'Continue' button is highlighted with a red circle and a blue arrow pointing to the right.

**Step 4:** Select the *Contact Date*.



A screenshot of a form field labeled "Contact Date:". To the right of the text is a date selection widget consisting of a white input box, a small downward-pointing arrow, and the text "MM/DD/YYYY". The entire widget is enclosed in a red rectangular border.

**Step 5:** Select the *Method of Communication* made to the parent/guardian.



A screenshot of a table titled "Method of Communication". The table has two columns: "Relevant" and "Items". The "Relevant" column contains four checkboxes, each of which is circled in red. The "Items" column lists four communication methods: "Met in person", "Spoke on the phone", "Exchanged e-mails/texts", and "Exchanged faxes".

Relevant	Items
<input type="checkbox"/>	Met in person
<input type="checkbox"/>	Spoke on the phone
<input type="checkbox"/>	Exchanged e-mails/texts
<input type="checkbox"/>	Exchanged faxes

**Step 6:** Click **Continue**.



A screenshot of a wizard navigation panel. It features three radio button options: "Continue - Please continue the wizard.", "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard.". The "Continue" option is selected and circled in red. At the bottom right, there is a "Continue" button with a right-pointing arrow, also circled in red. A "Cancel" button with a circular icon is located at the bottom center.

**Step 7:** Enter the *Effective Date*.



A screenshot of a form field labeled "Effective Date:". To the right of the text is a date selection widget consisting of a white input box, a small downward-pointing arrow, and the text "MM/DD/YYYY". The entire widget is enclosed in a red rectangular border.

**Step 8:** Enter the changes that are being made to the student's IEP.



A screenshot of a form field labeled "Changes and Explanation of Changes:". The label is highlighted in yellow. Below the label is a large, empty text area with a red border, intended for entering the details of the changes to the student's IEP.

**Step 9:** Click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

Cancel Continue →

**Step 10:** Select the personnel to be contact and signator for this IEP.

Form Contact List ( <a href="#">X</a> Modify ) ( Clear )					
Contact	Sincerely	Personnel	Title(s)		Phone(s)
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Johnny Smith	<a href="#">Title (Modify)</a>	<a href="#">Type</a>	<a href="#">Number (Modify)</a>
			Principal	Mobile	(217) 622-5555

NOTE: To modify, add, and/or delete personnel contact that will appear on this form see [IEP Form Contacts](#) for instructions.

Student Rights Transfer/Age of Majority Step 2 of 2

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header.

Form Contact List ( <a href="#">X</a> Modify ) ( Clear )					
Contact	Sincerely	Personnel	Title(s)		Phone(s)
<input checked="" type="radio"/>	<input checked="" type="radio"/>	DemoPaloma Allen	<a href="#">Title (Modify)</a>	<a href="#">Type</a>	<a href="#">Number (Modify)</a>
			General Education Teacher	Work	(618) 272-7470 Ext. 123

**Step 11:** When complete, click **Save and Continue**. Next, click **Save**.

Save and Continue - Please save and continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

← Previous Cancel Save →

**Step 12:** Select the form(s) you wish to amend by clicking the checkmark from the *Available Forms* box.

Available Forms				
View	Select	Name	Description	Meeting Date
	<input checked="" type="checkbox"/>	Form 37-44	Conference Summary	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54A	Documentation of Evaluation Results	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54B	Eligibility Determination (Other than SLD)	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54G	Present Levels of Academic Achievement and Functional Performance	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54J	Functional Behavioral Assessment	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54K-L	Behavioral Intervention Plan	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54M	Goals and Objectives	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54N	Educational Accommodations and Support	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54P	Educational Services and Placement	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54Q	Educational Services and Placement (Page 2)	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54S	Additional Notes/Information	06/12/2017
	<input checked="" type="checkbox"/>	Form 34-54V	Autism Considerations	06/12/2017

**Step 13:** When complete, click **Return**.



# Parent/Guardian and Student Notification of Transfer of Rights Due to Age

**Step 1:** Under the *Notice and Consent Forms* tab, select **Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority** form.

The screenshot shows a software interface with a tabbed menu at the top containing 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Notice and Consent Forms' tab is active. Below the tabs is a table titled 'Select the Form' with three columns: 'Started', 'IEP Forms', and 'Name'. The table lists various forms, with the row 'Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority' highlighted with a red border.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	<b>Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority</b>	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** Enter the *Form Date*.

The screenshot shows the 'Age of Majority' form. At the top, there is a 'Form Date' field with a date picker and a dropdown arrow, highlighted with a red border. Below this is a table with two columns: 'Select' and 'Items'. The 'Items' column contains two radio button options.

Select	Items
<input type="radio"/>	This serves as your one (1) year prior notice of the anticipated transfer of educational rights to the above named student under IDEA.
<input type="radio"/>	This serves as your notice that all educational rights under IDEA have been transferred to the above named student.

**Step 3:** Select the *Age of Majority*.


This screenshot is similar to the previous one, but the first radio button in the 'Select' column is now selected, highlighted with a red border.

Select	Items
<input checked="" type="radio"/>	This serves as your one (1) year prior notice of the anticipated transfer of educational rights to the above named student under IDEA.
<input type="radio"/>	This serves as your notice that all educational rights under IDEA have been transferred to the above named student.

**Step 4:** Click **Continue**.

The screenshot shows the bottom of the form with two radio button options: 'Continue - Please continue the wizard.' (selected and highlighted with a red border) and 'Cancel - Please exit the wizard.'. At the bottom right, there are two buttons: 'Cancel' and 'Continue' (highlighted with a red border and a blue arrow pointing right).


**Step 5:** Select the personnel to be contact and signator for this IEP.

Form Contact List (  Modify ) ( Clear )					
Contact	Sincerely	Personnel	Title(s)	Phone(s)	
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Johnny Smith	<b>Title</b> (Modify) Principal	<b>Type</b>	<b>Number</b> (Modify) Mobile (217) 622-5555

NOTE: To modify, add, and/or delete personnel contact that will appear on this form see **IEP Form Contacts** for instructions.

**Student Rights Transfer/Age of Majority** Step 2 of 2

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header. [Help](#)




Form Contact List (  Modify ) ( Clear )					
Contact	Sincerely	Personnel	Title(s)	Phone(s)	
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Allen, DemoPaloma	<b>Title</b> (Modify) Director of Special Education - District	<b>Type</b>	<b>Number</b> (Modify) Work (618) 272-7470 Ext. 123

**Step 6:** When complete, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.



# Delegation of Rights to Make Educational Decisions

**Step 1:** Under the *Notice and Consent Forms* tab, select **Delegation of Rights to Make Educational Decisions** form.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	<b>Delegation of Rights to Make Educational Decisions</b>	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** Enter *Form Date*.

Delegation of Rights to Make Educational Decisions Step 1

Please select the form date. [Help](#) ■

Form Date:  = MM/DD/YYYY

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

**Step 3:** Click **Save**.

**Save - Please save this form.**  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

## Consent for Outside Agency Invitation

**Step 1:** Under the *Notice and Consent Forms* tab, select **Consent For Outside Agency Invitation** form.

The screenshot shows a web interface with tabs for 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Notice and Consent Forms' tab is active, displaying a table titled 'Select the Form'.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	<b>Consent For Outside Agency Invitation</b>	Form 34-57L
	Mutual Written Agreement to Extend Evaluation Timeline	Form 34-57M

**Step 2:** You must assign this documentation to a meeting by either creating a new meeting or assigning it to an existing meeting. To extend the search criteria, click the drop-down list below.

The screenshot shows a web interface with a table titled 'Select a meeting (+ Add)'. The table has columns for 'Select', 'First Meeting Date', and 'Subject'. A checkbox labeled 'Show past meetings that are no more than 1 Week old' is checked. The '1 Week' dropdown menu is highlighted with a red box.

Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than 1 Week old

**Step 2a:** This will populate the past meetings. To select a past meeting, click the button located under the *Select* column.

The screenshot shows the same web interface as in Step 2. The '1 Week' dropdown menu is now '1 Week old'. The radio button in the 'Select' column is highlighted with a red box.

Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.

Show past meetings that are no more than 1 Week old

**Step 3:** If you are creating a new meeting, click **Add**.

Select a meeting <span style="border: 1px solid red; padding: 2px;">Add</span>		
Select	First Meeting Date	Subject
<input type="radio"/>	4/26/2018 8:00:00 AM	Conference to discuss DemoMckenzie Magda Watson's IEP.
<input checked="" type="checkbox"/> Show past meetings that are no more than <input type="text" value="1 Week"/> old		

**Step 3a:** To set up a conference, click **Create an IEP** and follow steps 5-33.


Form Date: / / - MM/DD/YYYY

Purpose of Conference <small>(Clear)</small>	
Select	Purpose
<input type="checkbox"/>	<b>Review of Existing Data</b> - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
<input type="checkbox"/>	<b>Initial Evaluation/Eligibility</b> - Review your child's recent evaluation to determine initial eligibility for special education and related services.
<input type="checkbox"/>	<b>Reevaluation</b> - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
<input type="checkbox"/>	<b>Initial IEP</b> - Review your child's need for special education and related services and placement and develop an initial IEP.
<input type="checkbox"/>	<b>IEP Review and Revision</b> - Review and/or revise your child's IEP to determine special education and related services and placement.
<input type="checkbox"/>	<b>Secondary Transition</b> - Consider postsecondary goals and transition services (beginning at age 14 1/2).
<input type="checkbox"/>	<b>FBA/BIP</b> - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
<input type="checkbox"/>	<b>MDR</b> - Consider relatedness of your child's disability to a disciplinary code violation(s).
<input type="checkbox"/>	<b>Graduation</b> - Review your child's anticipated date of graduation.
<input type="checkbox"/>	<b>Other</b> - (e.g. Termination of Placement, Aging Out) :
<input type="checkbox"/>	<input type="text"/>

**Step 4:** Select the *check box* Agencies that will be requested at the Transition meeting.

Consent For Agency Invitation to Transition Meeting		
Select	Description	Notes
<input type="checkbox"/>	Rehabilitation Services	Department of Human Services Division of Rehabilitation Services (DRS) (e.g., local DRS counselor)
<input type="checkbox"/>	Developmental Disabilities	Department of Human Services Division of Developmental Disabilities (e.g., case coordination or PAS agency encompassing our community)
<input type="checkbox"/>	Specialized Care	Division of Specialized Care for Children (DSCC)
<input type="checkbox"/>	Post-Secondary Education	Post-Secondary Education Disability Services (e.g., disability service office of any post-secondary education institution including community college, college, trade or vocational schools)
<input type="checkbox"/>	Other Agency	<input type="text"/>


**Step 5:** Select the personnel to be contact and signator for this IEP.

Form Contact List (  Modify ) ( Clear )					
Contact	Sincerely	Personnel	Title(s)		Phone(s)
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Johnny Smith	<b>Title</b> (Modify)	<b>Type</b>	<b>Number</b> (Modify)
			Principal	Mobile	(217) 622-5555

NOTE: To modify, add, and/or delete personnel contact that will appear on this form see **IEP Form Contacts** for instructions.

**Student Rights Transfer/Age of Majority** Step 2 of 2

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header.




Form Contact List (  Modify ) ( Clear )					
Contact	Sincerely	Personnel	Title(s)		Phone(s)
<input checked="" type="radio"/>	<input checked="" type="radio"/>	DemoPaloma Allen	<b>Title</b> (Modify)	<b>Type</b>	<b>Number</b> (Modify)
			General Education Teacher	Work	(618) 272-7470 Ext. 123

**Step 6:** When complete, click Save.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

 Previous  Cancel 

# Mutual Written Agreement to Extend Evaluation Timeline

**Step 1:** Under the *Notice and Consent Forms* tab, select **Mutual Written Agreement to Extend Evaluation Timeline** form.

Started	IEP Forms	Name
	Request for an Evaluation	Form 34-57A
	Consent for Initial Evaluation	Form 34-57B
	Consent for Reevaluation	Form 34-57C
	Notification of Conference	Form 34-57D
	Notification of Conference Recommendations	Form 34-57E
	Consent for Initial Provisions of Spec. Ed. and Related Services	Form 34-57F
	Notification of IEP Amendment	Form 34-57G
	Parent/Guardian and Student Notification of Transfer of Rights Due to Age of Majority	Form 34-57I
	Delegation of Rights to Make Educational Decisions	Form 34-57K
	Consent For Outside Agency Invitation	Form 34-57L
	<b>Mutual Written Agreement to Extend Evaluation Timeline</b>	Form 34-57M

**Step 2:** Enter the *Form Date*.

Form Date:  \* MM/DD/YYYY

Type:  Initial Evaluation  
 Re-Evaluation

Original Evaluation Date:  \* MM/DD/YYYY

Proposed Evaluation Date:  \* MM/DD/YYYY

Reason for Timeline Extension:

**Step 3:** Select the Evaluation *Type*.

Type:  Initial Evaluation  
 Re-Evaluation

**Step 4:** Enter the *Original Evaluation Date*.

Original Evaluation Date:  \* MM/DD/YYYY

**Step 5:** Enter the *Proposed Evaluation Date*.

Proposed Evaluation Date:  \* MM/DD/YYYY

**Step 6:** Enter a Reason for Timeline Extension.

Reason for Timeline Extension:

**Step 7:** Click **Continue**.

Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

**Step 8:** Modify, add, edit, and/or delete the *Form Contact List*. For Instructions See [IEP Form Contacts](#).

**Mutual Agreement to Extend Evaluation Timeline** Step 2 of 2

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header. [Help](#)

Form Contact List <input checked="" type="button" value="Modify (Clear)"/>					
Contact	Sincerely	Personnel	Title(s)		Phone(s)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Allen, DemoPaloma	<input checked="" type="button" value="Title (Modify)"/>	<input type="button" value="Type"/>	<input checked="" type="button" value="Number (Modify)"/>
			Director of Special Education - District	Work	(618) 272-7470 Ext. 123

**Step 9:** When complete, click **Save**.

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

# Eligibility Forms

Started	IEP Forms	Name
	Documentation of Evaluation Results	Form 34-54A
	Eligibility Determination (Other than SLD)	Form 34-54B
	Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
	Eligibility Determination (SLD)	Form 34-54D-E

NOTE: When conducting an eligibility meeting and IEP at the same meeting, the eligibility forms should be made official before the *IEP Conference Summary* Form is made official.

If not completed in the above order, the reevaluation date and eligibility category will not show up correctly on the *IEP Forms*.

# Documentation of Evaluation Results

**Step 1:** From the *Eligibility Forms* tab, select the **Documentation of Evaluation Results** form.

The screenshot shows a software interface with four tabs: 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Eligibility Forms' tab is active, displaying a 'Select the Form' dialog box. This dialog box contains a table with the following data:

Started	IEP Forms	Name
	Documentation of Evaluation Results	Form 34-54A
	Eligibility Determination (Other than SLD)	Form 34-54B
	Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
	Eligibility Determination (SLD)	Form 34-54D-E

**Step 2:** Click **Add** to add *Academic Achievement* OR check the box if the student is *Not Applicable* check the box and skip to step 5.

The screenshot shows the 'Academic Achievement' section of a form. At the top, it says 'Academic Achievement (Current or past academic achievement data pertinent to current educational performance.)'. Below this, there is a checkbox labeled 'Not Applicable' which is checked and circled in red. To the right of the checkbox is a blue button with a plus sign and the word 'Add', also circled in red. Below the checkbox and button is a table with the following structure:

Actions	Area	Remarks
No Records Found		

**Step 3:** Enter the *Area* and *Remarks* of *Academic Achievement*.

The screenshot shows the 'Academic Achievement' form with the following text: 'Complete this page after an initial evaluation, reevaluation, or review of an independent or outside evaluation. If prior to the meeting the parent(s) obtained an independent or outside evaluation, the team must document consideration of the evaluation. [Help](#) ■'. Below this is a red message: 'This information will be saved when you click Continue at the bottom of the wizard.' There is a blue button with a checkmark and the text 'Click Here to Add meeting notes'. Below that is the text 'Academic Achievement (Current or past academic achievement data pertinent to current educational performance.)'. The 'Area:' and 'Remarks:' fields are highlighted with a red box. At the bottom, there are 'Save' and 'Cancel' buttons.



**Step 4:** Click **Save**.

Academic Achievement (Current or past academic achievement data pertinent to current educational performance.)

Area: \*

Remarks:

**Step 5:** Click **Add** to add *Functional Performance*, OR if the student is **Not Applicable** check the box and skip to step 8.

Functional Performance (Current or past functional performance data pertinent to current functional performance.)

Not Applicable

Functional Performance

Actions	Area	Remarks
No Records Found		

**Step 6:** Enter the *Area and Remarks of Functional Performance*.

Functional Performance (Current or past functional performance data pertinent to current functional performance.)

Area: \*

Remarks:

**Step 7:** When complete, click **Save**.

Functional Performance (Current or past functional performance data pertinent to current functional performance.)

Area: \*

Remarks:

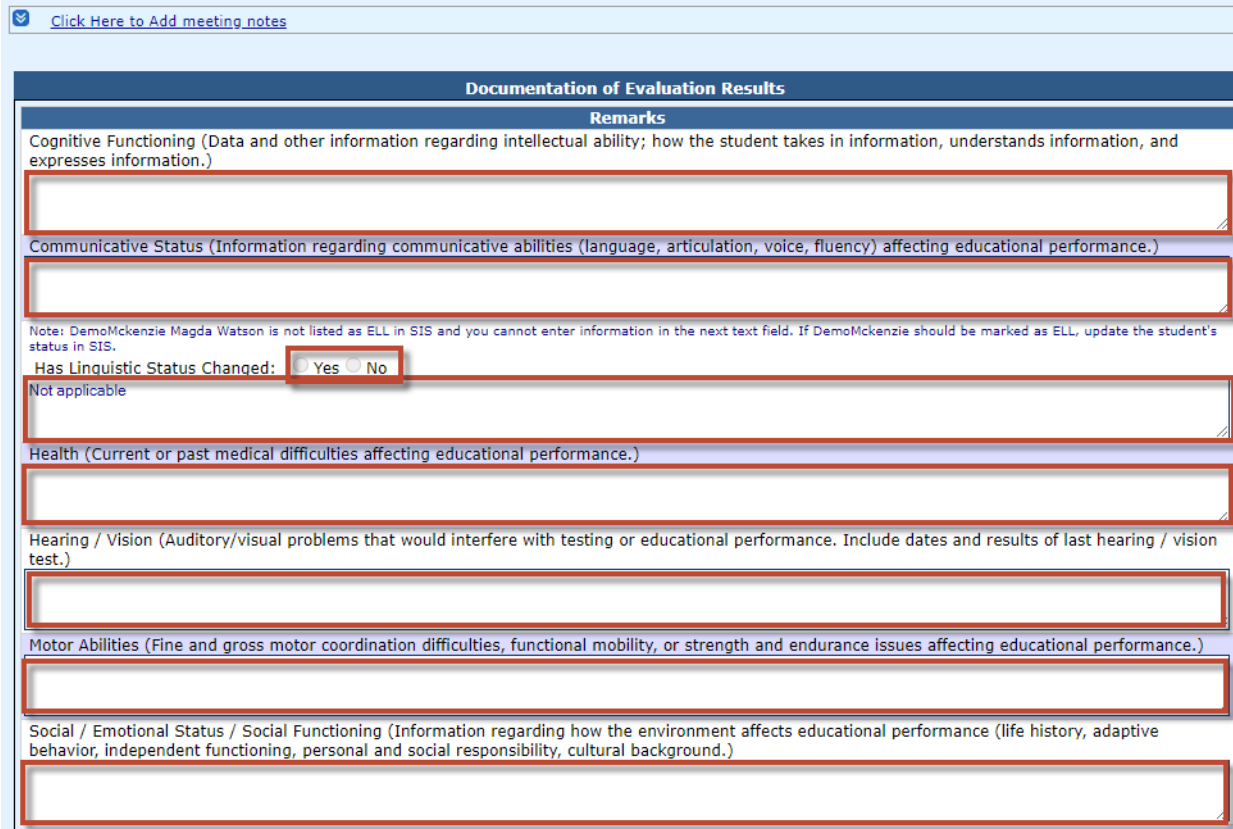
**Step 8:** Click **Continue**.



A navigation bar with a light blue background. At the top, there are three radio button options: "Continue - Please continue the wizard." (selected and circled in red), "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard." Below the options is a dark blue bar containing four buttons: "Previous" (with a left arrow), "Cancel" (with a crossed-out circle), "Save Now" (with a floppy disk icon), and "Continue" (with a right arrow and circled in red).

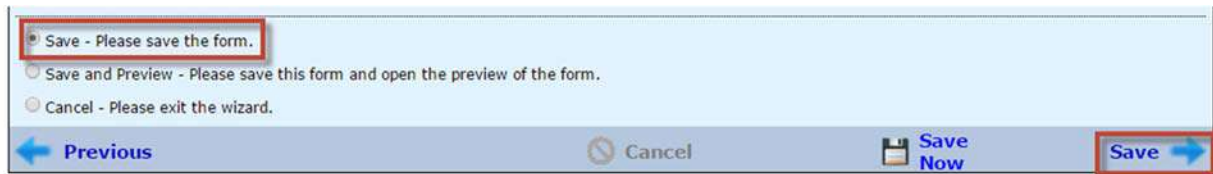
**Step 9:** Complete this page AFTER an initial evaluation, reevaluation, or review of an independent or outside evaluation. Enter the *Documentation of Evaluation Results*.

Complete this page after an initial evaluation, reevaluation, or review of an independent or outside evaluation. If prior to the meeting the parent(s) obtained an independent or outside evaluation, the team must document consideration of the evaluation. [Help](#)



A form titled "Documentation of Evaluation Results" with a blue header. Below the header is a "Remarks" section with several text input fields, each circled in red. The fields are: "Cognitive Functioning (Data and other information regarding intellectual ability; how the student takes in information, understands information, and expresses information.)", "Communicative Status (Information regarding communicative abilities (language, articulation, voice, fluency) affecting educational performance.)", "Has Linguistic Status Changed: Yes No" (with "No" selected and circled in red), "Health (Current or past medical difficulties affecting educational performance.)", "Hearing / Vision (Auditory/visual problems that would interfere with testing or educational performance. Include dates and results of last hearing / vision test.)", "Motor Abilities (Fine and gross motor coordination difficulties, functional mobility, or strength and endurance issues affecting educational performance.)", and "Social / Emotional Status / Social Functioning (Information regarding how the environment affects educational performance (life history, adaptive behavior, independent functioning, personal and social responsibility, cultural background.)". A link "Click Here to Add meeting notes" is visible at the top left of the form area.

**Step 10:** When complete, click **Save**.



A navigation bar with a light blue background. At the top, there are three radio button options: "Save - Please save the form." (selected and circled in red), "Save and Preview - Please save this form and open the preview of the form.", and "Cancel - Please exit the wizard." Below the options is a dark blue bar containing four buttons: "Previous" (with a left arrow), "Cancel" (with a crossed-out circle), "Save Now" (with a floppy disk icon), and "Save" (with a right arrow and circled in red).

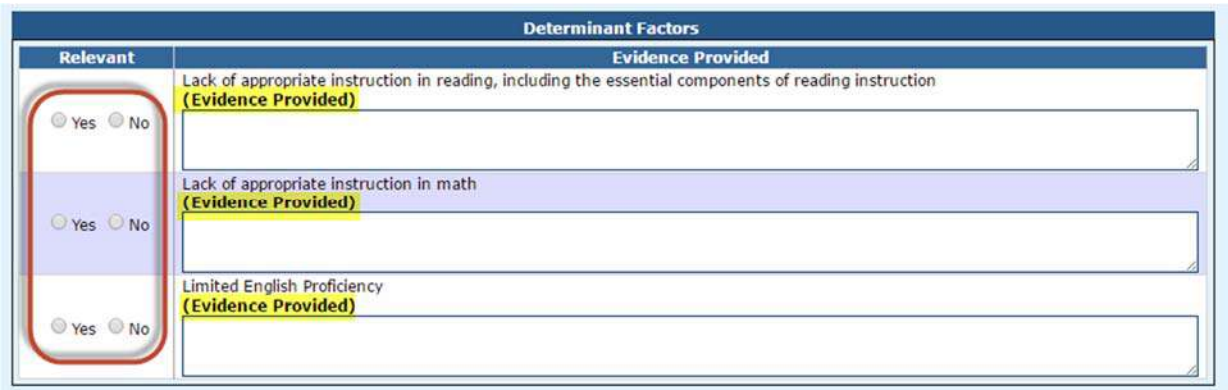
# Eligibility Determination (Other than SLD)

**Step 1:** From the *Eligibility Forms* tab, select the **Eligibility Determination (Other than SLD)**.



Started	IEP Forms	Name
	Documentation of Evaluation Results	Form 34-54A
	<b>Eligibility Determination (Other than SLD)</b>	Form 34-54B
	Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
	Eligibility Determination (SLD)	Form 34-54D-E

**Step 2:** Select **Yes** or **No** and *Evidence Provided*.



Relevant	Evidence Provided
<input checked="" type="radio"/> Yes <input type="radio"/> No	Lack of appropriate instruction in reading, including the essential components of reading instruction <b>(Evidence Provided)</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No	Lack of appropriate instruction in math <b>(Evidence Provided)</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No	Limited English Proficiency <b>(Evidence Provided)</b>

**Step 3:** Click **Continue**.



Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

[Previous](#) [Cancel](#) [Save Now](#) [Continue](#)

**Step 4:** Determine if the disability is identified. If "No disability identified" skip to step 5.



If a disability is identified then enter applicable information pertaining to adverse effects, suspected disability and educational needs.

[Spell Check](#)

Select	Disability
<input type="radio"/>	No disability identified
<input checked="" type="radio"/>	Disability identified

NOTE: If *Disability Identified*, complete steps 4a-4b.

**Step 4a:** Select the *Primary and Secondary Disabilities*.

Disability	
Select	
<input type="radio"/>	No disability identified
<input checked="" type="radio"/>	Disability identified

Based on the team's analysis, select the primary and secondary disabilities.

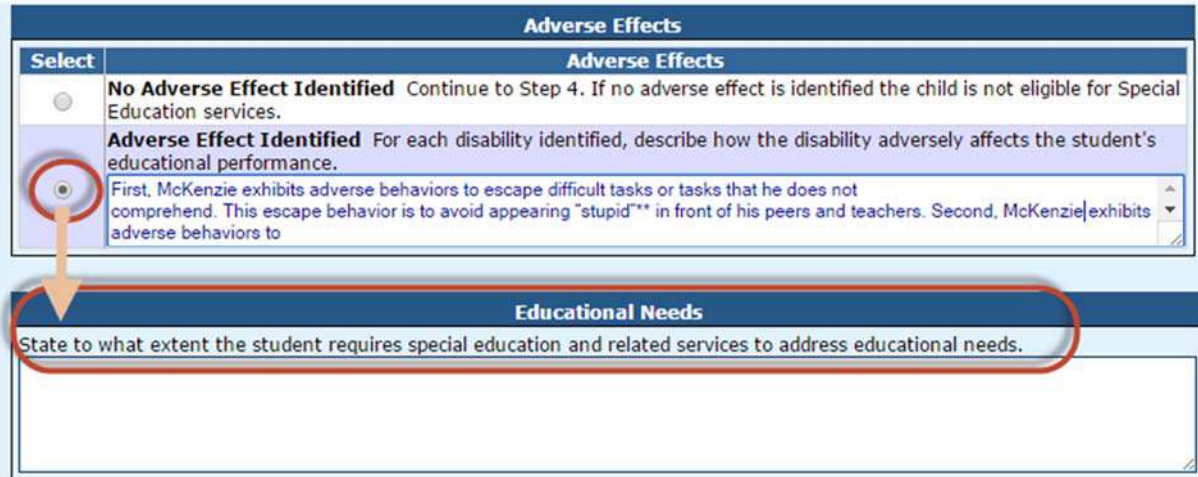
Identify Disability (Clear)		
Primary	Secondary	Disability
<input type="radio"/>	<input type="checkbox"/>	Autism (O)
<input type="radio"/>	<input type="checkbox"/>	Deaf-Blindness (H)
<input type="radio"/>	<input type="checkbox"/>	Deafness (G)
<input type="radio"/>	<input type="checkbox"/>	Developmental Delay (N)
<input type="radio"/>	<input type="checkbox"/>	Emotional Disability (K)
<input type="radio"/>	<input type="checkbox"/>	Hearing Impairment (F)
<input type="radio"/>	<input type="checkbox"/>	Intellectual Disability (A)
<input type="radio"/>	<input type="checkbox"/>	Multiple Disabilities (M)
<input type="radio"/>	<input type="checkbox"/>	Orthopedic Impairment (C)
<input type="radio"/>	<input type="checkbox"/>	Other Health Impairment (L)
<input type="radio"/>	<input type="checkbox"/>	Speech and/or Language Impairment (I)
<input type="radio"/>	<input type="checkbox"/>	Traumatic Brain Injury (P)
<input type="radio"/>	<input type="checkbox"/>	Visual Impairment (E)

Adverse Effects	
Select	Adverse Effects
<input type="radio"/>	<b>No Adverse Effect Identified</b> Continue to Step 4. If no adverse effect is identified the child is not eligible for Special Education services.
<input type="radio"/>	<b>Adverse Effect Identified</b> For each disability identified, describe how the disability adversely affects the student's educational performance.

**Step 4b:** Select the *Adverse Effects*.

Adverse Effects	
Select	Adverse Effects
<input checked="" type="radio"/>	<b>No Adverse Effect Identified</b> Continue to Step 4. If no adverse effect is identified the child is not eligible for Special Education services.
<input type="radio"/>	<b>Adverse Effect Identified</b> For each disability identified, describe how the disability adversely affects the student's educational performance.

NOTE: IF *Adverse Effect Identified* is selected, the *Educational Needs* section will appear and the student's educational needs should be entered.



Adverse Effects	
<input type="radio"/>	<b>No Adverse Effect Identified</b> Continue to Step 4. If no adverse effect is identified the child is not eligible for Special Education services.
<input checked="" type="radio"/>	<b>Adverse Effect Identified</b> For each disability identified, describe how the disability adversely affects the student's educational performance. First, McKenzie exhibits adverse behaviors to escape difficult tasks or tasks that he does not comprehend. This escape behavior is to avoid appearing "stupid" in front of his peers and teachers. Second, McKenzie exhibits adverse behaviors to

**Educational Needs**  
State to what extent the student requires special education and related services to address educational needs.

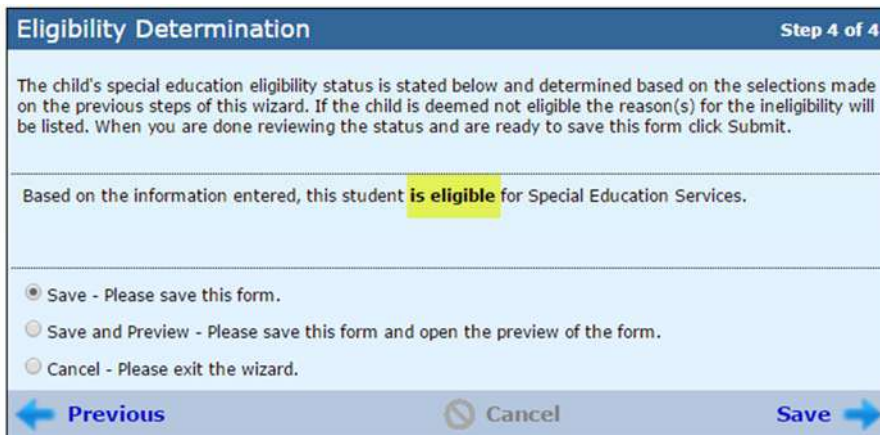
**Step 5:** Click **Continue**.



Continue - Please continue the wizard.  
 Cancel - Please exit the wizard.

← Previous      Cancel      Save Now      Continue →

**Step 6:** Based on the information entered, the child's special education eligibility status will be stated here.



**Eligibility Determination** Step 4 of 4

The child's special education eligibility status is stated below and determined based on the selections made on the previous steps of this wizard. If the child is deemed not eligible the reason(s) for the ineligibility will be listed. When you are done reviewing the status and are ready to save this form click Submit.

Based on the information entered, this student **is eligible** for Special Education Services.

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

← Previous      Cancel      Save →

**Step 7: Click Save.**

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Save →](#)

# Documentation of Intervention/Evaluation Results (SLD)

**Step 1:** From the *Eligibility Forms* tab, select the **Documentation of Intervention/Evaluation Results (SLD)**.

Started	IEP Forms	Name
	Documentation of Evaluation Results	Form 34-54A
	Eligibility Determination (Other than SLD)	Form 34-54B
	Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
	Eligibility Determination (SLD)	Form 34-54D-E

**Step 2:** Provide the *Problem Identification/Statement of Problem*.

**Documentation of Intervention/Evaluation Results** Step 2 of 2

As part of the evaluation process, relevant behavior noted during observation in the child's age-appropriate learning environment, including the general education classroom setting for school-age children, and the relationship of that behavior to the child's academic functioning and educationally relevant medical findings, if any, must be documented. [Help](#)

[Click Here to Add meeting notes](#)

**Documentation of Intervention / Evaluation Results**

**Remarks**

**Problem Identification / Statement of problem**  
Using baseline data, please provide an initial performance discrepancy statement for all identified areas of concern in the relevant domains (academic performance; functional performance; cognitive functioning, communicative status (for ELL students includes an explanation of ELL status and any change in linguistic status); social/emotional status functioning, motor abilities, health, hearing, and vision) including information about the student's performance discrepancy prior to intervention. Attach evidence.

**Step 3:** Describe the *Problem Analysis/Strengths and Weaknesses*.

**Problem Analysis / Strengths and Weaknesses**  
Describe student's skill strengths and weaknesses in the identified areas(s) of concern within the relevant domains. Attach evidence, including evidence of skills deficit versus performance deficit.

**Step 4:** Describe the *Plan of Development/Intervention(s)*.

**Plan Development / Intervention(s)**  
Describe the previous and current intervention plans (core/Tier 1, supplemental/Tier 2, and intensive/Tier 3) including evidence that the intervention is scientifically based and was implemented with integrity. Attach plan/evidence.

**Step 5:** Provide the *Plan of Evaluation/Educational Progress*.

**Plan Evaluation / Educational Progress**  
Provide documentation of student progress over time as a result of the intervention. Attach evidence/graphs.

**Step 6:** Enter the *Plan of Evaluation/Discrepancy*.

**Plan Evaluation / Discrepancy**  
States the current performance discrepancy after intervention, i.e., the difference between a student's level of performance compared to the performance of peers or scientifically-based standards of expected performance. Attach evidence.

**Step 7:** Enter the *Plan of Evaluation/Instructional Needs*.

**Plan Evaluation / Instructional Needs**  
Summarize the student's needs in the area of curriculum, instructions, and environment. Include a statement of whether the student's needs in terms of materials, planning, and personnel required for intervention implementation are significantly different from those of general education peers. Attach evidence.

**Step 8:** Enter any *Additional Information Necessary for Decision-Making*.

**Additional Information Necessary for Decision-Making**  
Report any educationally relevant information necessary for decision-making, including information regarding eligibility exclusionary and inclusionary criteria. Attach evidence.

**Step 9:** When complete, click **Save**.

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

[← Previous](#)      [Cancel](#)      [Save Now](#)      [Save →](#)



# Eligibility Determination (SLD)

**Step 1:** From the *Eligibility Forms* tab, select the **Eligibility Determination (SLD)**.

The screenshot shows a software interface with four tabs: 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Eligibility Forms' tab is active. Below the tabs is a table titled 'Select the Form' with two columns: 'Started' and 'Name'. The table lists four forms, with the last one, 'Eligibility Determination (SLD)', highlighted in blue and enclosed in a red rectangular box.

Started	Name
Documentation of Evaluation Results	Form 34-54A
Eligibility Determination (Other than SLD)	Form 34-54B
Documentation of Intervention/Evaluation Results (SLD)	Form 34-54C
Eligibility Determination (SLD)	Form 34-54D-E

**Step 2:** Select **Yes** or **No** and document the *Evidence Provided*.

The screenshot shows the 'Determinant Factors' section of the form. It has two columns: 'Relevant' and 'Evidence Provided'. There are three rows of factors. In the 'Relevant' column, there are radio buttons for 'Yes' and 'No'. The 'Yes' radio button for the first row is selected and circled in red. The 'Evidence Provided' column contains text boxes for each factor, with the first two containing the text '(Evidence Provided)' in yellow.

Relevant	Evidence Provided
<input checked="" type="radio"/> Yes <input type="radio"/> No	Lack of appropriate instruction in reading, including the essential components of reading instruction (Evidence Provided)
<input type="radio"/> Yes <input type="radio"/> No	Lack of appropriate instruction in math (Evidence Provided)
<input type="radio"/> Yes <input type="radio"/> No	Limited English Proficiency (Evidence Provided)

**Step 3:** Select **Yes** or **No** to indicate if the team has determined that the student's instructional need is the primary result of a visual, hearing or motor disability, cognitive disability, emotional disability, cultural factors, or environmental or economic disadvantage and document the *Evidence Provided* in each area.

The screenshot shows the 'Exclusionary Criteria' section of the form. It has two columns: 'Primary Basis' and 'Evidence Provided'. There are five rows of criteria. In the 'Primary Basis' column, there are radio buttons for 'Yes' and 'No'. The 'Yes' radio button for the first row is selected and circled in red. The 'Evidence Provided' column contains text boxes for each criterion, with the first four containing the text '(Evidence Provided)' in yellow.

Primary Basis	Evidence Provided
<input checked="" type="radio"/> Yes <input type="radio"/> No	A visual, hearing or motor disability (Evidence Provided)
<input type="radio"/> Yes <input type="radio"/> No	Cognitive disability (Evidence Provided)
<input type="radio"/> Yes <input type="radio"/> No	Emotional disability (Evidence Provided)
<input type="radio"/> Yes <input type="radio"/> No	Cultural factors (Evidence Provided)
<input type="radio"/> Yes <input type="radio"/> No	Environmental or economic disadvantages (Evidence Provided)

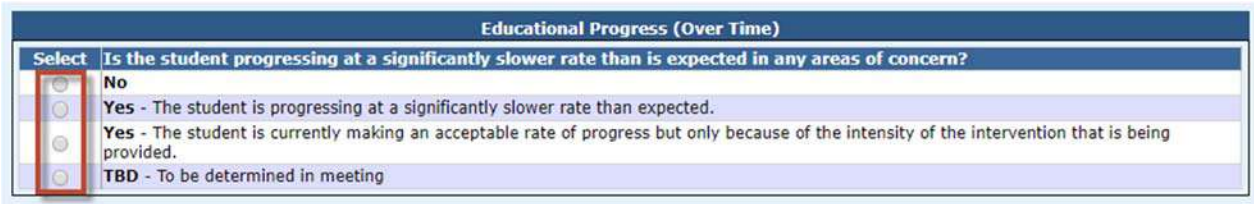
**Step 4:** Click **Continue**.



Continue - Please continue the wizard.  
Cancel - Please exit the wizard.

Previous Cancel Continue

**Step 5:** Select the best description of the student's *Educational Progress*.



**Educational Progress (Over Time)**

Select **Is the student progressing at a significantly slower rate than is expected in any areas of concern?**

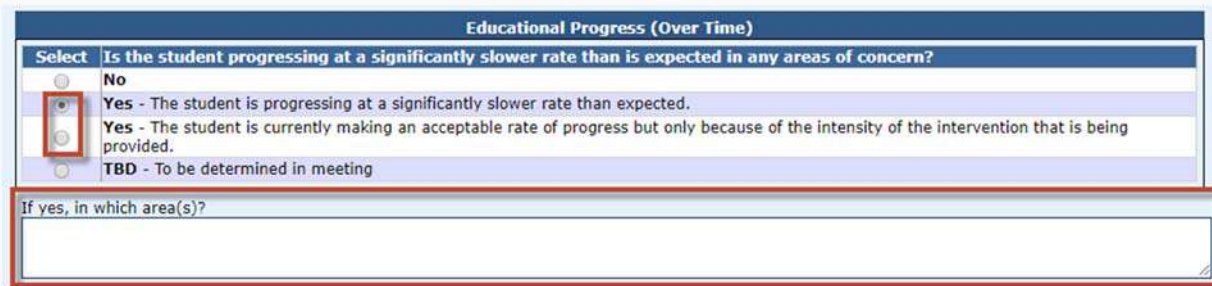
No

Yes - The student is progressing at a significantly slower rate than expected.

Yes - The student is currently making an acceptable rate of progress but only because of the intensity of the intervention that is being provided.

TBD - To be determined in meeting

NOTE: If **Yes** is selected, describe which area(s).



**Educational Progress (Over Time)**

Select **Is the student progressing at a significantly slower rate than is expected in any areas of concern?**

No

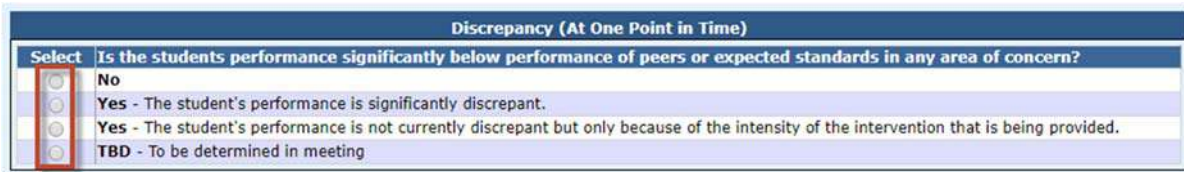
Yes - The student is progressing at a significantly slower rate than expected.

Yes - The student is currently making an acceptable rate of progress but only because of the intensity of the intervention that is being provided.

TBD - To be determined in meeting

If yes, in which area(s)?

**Step 6:** Select the best description of the *Discrepancy*.



**Discrepancy (At One Point in Time)**

Select **Is the students performance significantly below performance of peers or expected standards in any area of concern?**

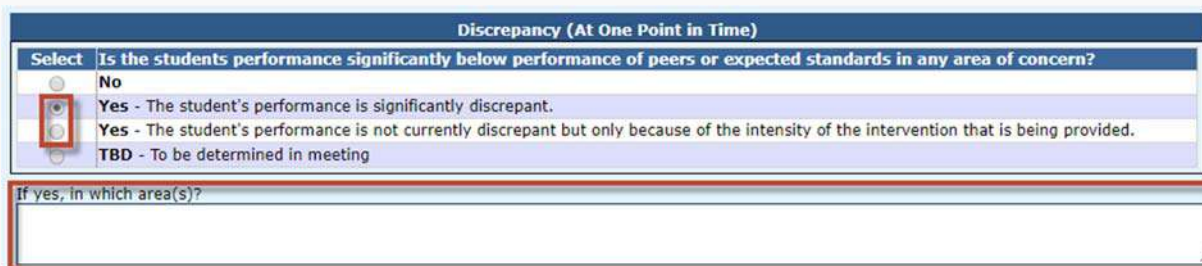
No

Yes - The student's performance is significantly discrepant.

Yes - The student's performance is not currently discrepant but only because of the intensity of the intervention that is being provided.

TBD - To be determined in meeting

NOTE: If **Yes** is selected, describe which area(s).



**Discrepancy (At One Point in Time)**

Select **Is the students performance significantly below performance of peers or expected standards in any area of concern?**

No

Yes - The student's performance is significantly discrepant.

Yes - The student's performance is not currently discrepant but only because of the intensity of the intervention that is being provided.

TBD - To be determined in meeting

If yes, in which area(s)?

**Step 7:** Select the best description of the student's *Instructional Needs*.

Instructional Need	
Select	Are this student's needs in any areas of concern significantly different from the needs of typical peers and of an intensity or type that exceeds general education resources?
<input type="radio"/>	No
<input checked="" type="radio"/>	Yes - The student's instructional needs are significantly different and exceed general education resources.
<input type="radio"/>	TBD - To be determined in meeting

NOTE: If **Yes** is selected, describe which area(s).

Instructional Need	
Select	Are this student's needs in any areas of concern significantly different from the needs of typical peers and of an intensity or type that exceeds general education resources?
<input type="radio"/>	No
<input checked="" type="radio"/>	Yes - The student's instructional needs are significantly different and exceed general education resources.
<input type="radio"/>	TBD - To be determined in meeting

If yes, in which area(s)?

**Step 8:** Click **Continue**.

Continue - Please continue the wizard.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Continue →](#)

**Step 9:** The child's specific learning disability and special education eligibility status is stated and determined based on the selections made on the previous steps of this wizard.

NOTE: If the student is determined NOT ELIGIBLE, go to Step 10.

NOTE: If the student is determined ELIGIBLE, complete steps 9a-step 9c below.

**Step 9a:** Complete the *Optional Criteria* section.

After determining that the criteria in the preceding section are met, the district may choose to use an IQ-achievement discrepancy model. If using this model, complete this section or select NA and complete the other sections of this form.

Optional Criteria	
<b>IQ-Achievement Discrepancy</b>	Does a severe discrepancy exist between achievement and ability that is not correctable without special education and related services? (Please refer to evidence in Documentation of Evaluation Results)?
<input checked="" type="radio"/>	Yes - A severe discrepancy exist between achievement and ability that is not correctable without special education and related services.
<input type="radio"/>	No - A severe discrepancy does not exist between achievement and ability.
<input type="radio"/>	NA

**Step 9b:** Determine if this is the *Primary* or *Secondary Disability*.

Is this the primary or secondary disability?

- Primary
- Secondary

**Step 9c:** Select *Disability Area(s)*.

Disability Area(s)	
Select	Area
<input type="checkbox"/>	Basic reading skills
<input type="checkbox"/>	Reading fluency skills
<input type="checkbox"/>	Reading comprehension
<input type="checkbox"/>	Mathematical calculation
<input type="checkbox"/>	Mathematical problem solving
<input type="checkbox"/>	Written expression
<input type="checkbox"/>	Oral expression
<input type="checkbox"/>	Listening comprehension

**Step 10:** Click **Continue**.

Continue - Please continue the wizard.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Continue →](#)

**Step 11:** Determine if *Conference Attendees* agree or disagree by selecting **Yes** or **No**.

Conference Attendees (Modify)	
Agrees	Name
<input type="radio"/> Yes <input type="radio"/> No	Gray, Train09Olivia
<input type="radio"/> Yes <input type="radio"/> No	Schmitt, Kenzie

**Step 12:** When complete, click **Save**.

The screenshot shows a wizard interface with a light blue background. At the top, there are three radio button options:   
1.  Save - Please save this form. (This option is circled in red)   
2.  Save and Preview - Please save this form and open the preview of the form.   
3.  Cancel - Please exit the wizard.   
At the bottom, there is a dark blue navigation bar with four buttons:   
- **Previous** (with a left-pointing arrow)   
- **Cancel** (with a crossed-out circle icon)   
- **Save Now** (with a floppy disk icon)   
- **Save** (with a right-pointing arrow) (This button is circled in red)

# Other Forms

IEP Forms   Notice and Consent Forms   Eligibility Forms   **Other Forms**

Select the Form

Started	IEP Forms	Name
	Revocation of Consent	
	Autism Considerations	Form 34-54V
	Summary of Performance	Form 34-60

# Revocation of Consent

**Step 1:** From the *Other Forms* tab, select the **Revocation of Consent** form.

Select the Form		
Started	IEP Forms	Name
	Revocation of Consent	
	Autism Considerations	Form 34-54V
	Summary of Performance	Form 34-60

**Step 2:** Enter the *Form Date* and *Contact Date* the parent/guardian revoked consent for the provision of special education services for this student.

**Parent/Guardian Revocation of Consent** Step 1 of 2

Enter the date and the method of communication the parent/guardian revoked consent for the provision of special education services for this student. [Help](#)

Form Date:  \* MM/DD/YYYY

Contact Date:  \* MM/DD/YYYY

Contact Method:  oral  
 written

Show Audit Trail

**Step 3:** Select either **Oral** or **Written** for the *Contact Method*.

**Parent/Guardian Revocation of Consent** Step 1 of 2

Enter the date and the method of communication the parent/guardian revoked consent for the provision of special education services for this student. [Help](#)

Form Date:  \* MM/DD/YYYY

Contact Date:  \* MM/DD/YYYY

Contact Method:  oral  
 written

Show Audit Trail

**Step 4:** Click **Continue**.

Show Audit Trail

Continue - Please continue the wizard.

Cancel - Please exit the wizard.

**Step 5:** Enter the Personnel that will appear on this form.

**Parent/Guardian Revocation of Consent** Step 2 of 2

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header. [Help](#)

Form Contact List		Modify	(Clear)	
Contact	Sincerely	Personnel	Title(s)	Phone(s)
No Records Found				

Show Audit Trail

**Step 6:** When complete, click **Save**.

Save - Please save this form.

Save and Preview - Please save this form and open the preview of the form.

Cancel - Please exit the wizard.



## Summary of Performance

**Step 1:** From the *Other Forms* tab, select the **Summary of Performance** form.

The screenshot shows a software interface with four tabs: 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', and 'Other Forms'. The 'Other Forms' tab is active. Below the tabs is a table titled 'Select the Form' with two columns: 'Started' and 'Name'. The table contains three rows: 'Revocation of Consent', 'Autism Considerations', and 'Summary of Performance'. The 'Summary of Performance' row is highlighted with a red border.

Started	Name
	Revocation of Consent
	Autism Considerations
	Summary of Performance

**Step 2:** Enter the *Anticipated Graduation Date*.

The screenshot shows the 'Summary of Performance' form, labeled 'Step 2 of 10'. The form contains the following text: 'Complete the Summary of Performance (SOP) to comply with the new requirement in IDEA 2004. Subsequent to the termination of the student's eligibility due to graduation or aging out, the Summary of Performance must be provided to the student. This form must be completed in the final year prior to the student exiting high school.' Below this is a red note: 'This information will be saved when you click Continue at the bottom of the wizard.' The form has four input fields: 'Anticipated Graduation Date' (with a dropdown arrow and '\* MM/DD/YYYY' label), 'Date Summary Completed' (with a dropdown arrow and 'MM/DD/YYYY' label), 'Most Recent IEP Start Date', and 'Person Completing Form' (with a 'Search' button).

**Step 3:** Enter the *Date Summary Completed*.

This close-up shows two date input fields. The first is 'Anticipated Graduation Date' with a dropdown arrow and a red asterisk followed by '\* MM/DD/YYYY'. The second is 'Date Summary Completed' with a dropdown arrow and 'MM/DD/YYYY'.

NOTE: The *Most Recent IEP Start Date* is automatic.

Most Recent IEP Start Date: 2/27/2018

**Step 4:** Click **Search** to enter the person completing this form.

This close-up shows the 'Person Completing Form' label and a 'Search' button. The 'Search' button is highlighted with a red border.

**Step 5: Search** for the personnel completing this form.



The Personnel Search form is titled "Personnel Search" and has two tabs: "Multiple" and "Single". The "Multiple" tab is selected. It contains a "District" dropdown menu with "Jasper County CUD 1" selected. To the right, there is an "IEIN:" field. Below these are input fields for "Last Name:", "First Name:", and "Gender:". There is also an "Include Retired" checkbox. At the bottom, there are three buttons: "Search", "Clear Search", and "Cancel". The "Search" button is circled in red. A note at the bottom reads: "Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS."

**Step 6:** Once user is found, click the check-mark to select the user.



The Personnel Search Results table has a header row with the following columns: "Select", "IEIN", "Name", "Gender", "Ethnicity", "District", "Spec Ed Id", and "Work". The first row of data shows a checkmark in the "Select" column, a blacked-out "IEIN", and the name "Mackenzie Schmitt". The "Select" column's checkmark is circled in red.

Select	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
✓		Mackenzie Schmitt					

**Step 6a:** Enter the Personnel *Phone Number* by clicking **Modify**.



The form shows "Person Completing Form: Mackenzie Schmitt" with a "Search" button. Below, it says "Mackenzie's Phone Numbers:" followed by a header "Phone Numbers" and a circled "Modify" button. Underneath is a table with columns "Type" and "Number", containing the text "No Records Found".

**Step 6b:** Click **Add**.



The "Phone Numbers" wizard is titled "Step 1". It contains the text: "You may add, edit and delete multiple phone numbers using this wizard." Below a dashed line, it says "Phone numbers for Retrieve from EIS". At the bottom, there is a header "Phone Numbers" and a circled "+ Add" button. Underneath is a table with columns "Type" and "Number", containing the text "No Records Found".

**Step 6c:** Enter the *Phone Type*, *Phone Number*, and *Extension* (if available). Then, click the **Save** button.

Phone numbers for **Retrieve from EIS**


Phone Numbers ( + Add)	
Type	Number
No Records Found	

Enter the new phone number and click the Save button.

Phone Type:

Phone Number:

Extension:



**Step 6d:** Click **Return** when finished.



**Step 7:** Click **Continue**.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

**Step 8:** Enter the recommendations of modifications and accommodations to assist the student in meeting the *Student Post-Secondary Goal(s)*.

Student Post-Secondary Goal(s)	
Employment Outcomes/Goals	
Post-Secondary Education Outcomes/Goals	
Post-Secondary Training Outcomes/Goals	
Independent Living Outcomes/Goals	

**Step 9:** Click **Continue**.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

[← Previous](#)
[Cancel](#)
[Continue →](#)

**Step 10:** Enter the student's *Summary of Academic Achievement and Functional Performance* and *Assessment(s)* for each *Academic/Functional* area.

[Click Here to Add meeting notes](#)

Academic Achievement and Functional Performance		
Academic/Functional Area	Summary of Present Levels of Academic Achievement and Functional Performance	Assessment(s)
<b>Academic Reading and Math</b> (e.g., basic skills, reading comprehension, decoding; math calculation skills, math problem solving)		
<b>Functional Performance</b> (e.g., general ability and problem solving, attention/organization, social skills and behaviors, self advocacy)		
<b>Independent Living</b> (e.g., self-care, transportation, life skills, personal safety)		
<b>Communication Status (Written and Oral)</b> (e.g., speech/language, writing ability, expressive/receptive language)		
<b>Vocational &amp; Career</b> (e.g., job training, career explorations)		

**Step 11:** Click **Continue**.



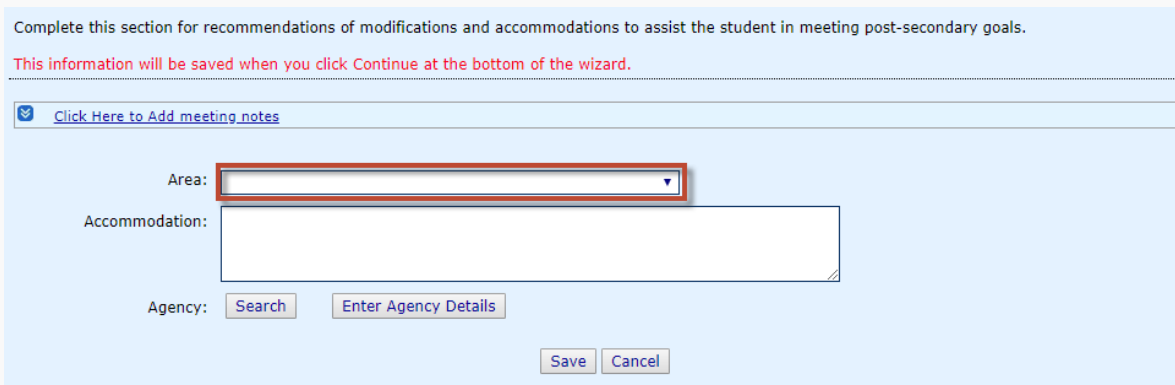
Wizard navigation bar with three radio buttons: 'Continue - Please continue the wizard.' (selected and highlighted with a red box), 'Save and Exit - Please save this form and exit the wizard.', and 'Cancel - Please exit the wizard.'. Below the buttons are three navigation options: 'Previous' (left arrow), 'Cancel' (stop icon), and 'Continue' (right arrow, highlighted with a red box).

**Step 12:** Click **Add** to complete this section for recommendations of modifications and accommodations to assist the student in meeting post-secondary goals.



Form section for 'Recommended Accommodations and Modifications for Post-School'. It includes a table with columns: Edit, Delete, Area, Accommodation/Support, and Agency. The table currently shows 'No Records Found'. An '+ Add' button is highlighted with a red box. Other elements include a 'Click Here to Add meeting notes' link and a 'Show Audit Trail' checkbox.

**Step 12a:** Select the *Area* in the drop-down.



Form for adding a new accommodation. It includes a text area for 'Accommodation', a dropdown menu for 'Area' (highlighted with a red box), and buttons for 'Search' and 'Enter Agency Details' under the 'Agency' label. At the bottom are 'Save' and 'Cancel' buttons. The form also includes a 'Click Here to Add meeting notes' link and a header with instructions.

**Step 12b:** Enter the *Accommodations*.

Area:

Accommodation:

Agency:

**Step 12c:** To enter an *Agency* from whom the student may be getting accommodations, you can either:

A.) **Search** for the entity, OR

Area:

Accommodation:

Agency:

**Entity Search**

**General Search**

Name:

Address:

City:

within  miles of

Zip Code:

RCDT:

**Additional Search Criteria**

County:

Facility Type:

**Entity Search Results**

Select	RCDTS	Name	Facility Type	Address	City	State	Zip	County
No Records Found								

## B.) Enter Agency Details.

Agency:

Agency Name:

Contact Name:

Phone Number:

Address: 

Addresses ( <input type="button" value="+ Add"/> )	
Edit	Address
No Records Found	

**Step 12d:** When complete, click **Save**.

Area:

Accommodation:

Agency:

**Step 13:** When complete, click **Continue**.

Recommended Accommodations and Modifications for Post-School ( <input type="button" value="+ Add"/> )				
Edit	Delete	Area	Accommodation/Support	Agency
<input type="button" value="✎"/>	<input checked="" type="checkbox"/>	Employment	job coach	HRC
<input type="button" value="✎"/>	<input checked="" type="checkbox"/>	Independent Living	Will need support managing finances	HRC

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

**Step 14:** Select the *Individuals Completing This Section*.

Individuals Completing This Section	
<input type="checkbox"/>	Parent
<input type="checkbox"/>	Student
<input type="checkbox"/>	Teacher
<input type="checkbox"/>	Independently
<input type="checkbox"/>	With adult assistance
<input type="checkbox"/>	Other Support Person
<input type="checkbox"/>	

**Step 15:** Enter the *Student Perspective*.

NOTE: This section may be completed independently by the student or with assistance.

Complete this section to provide student's input. This section may be completed independently by the student or with assistance.

This information will be saved when you click Continue at the bottom of the wizard.

[Click Here to Add meeting notes](#)

Individuals Completing This Section	
<input type="checkbox"/>	Parent
<input checked="" type="checkbox"/>	Student
<input checked="" type="checkbox"/>	Teacher
<input type="checkbox"/>	Independently
<input checked="" type="checkbox"/>	With adult assistance
<input type="checkbox"/>	Other Support Person
<input type="checkbox"/>	

### Student Perspective

How does your disability affect you in the work environment? What strengths do you have in the work environment?

What strengths and needs should professionals know about you as you enter the postsecondary education or work environment?

How does your disability affect your schoolwork and school activities (e.g. grades, assignments)?



**Step 16:** To add *Accommodations and Supports*, click **Add**.

Complete the table below by identifying the accommodations and supports that have been tried by teachers or by you (e.g. pacing, extra time, visual supports, adaptive equipment) to help you succeed in school. Please indicate whether each one was effective or not effective.

This information will be saved when you click **Continue** at the bottom of the wizard.

[Click Here to Add meeting notes](#)

Accommodations and Supports <a href="#">+ Add</a>					
Edit	Delete	Area	Accommodations/Supports	Effective	Not Effective
No Records Found					

**Step 16a:** Enter the *Area*, *Accommodations and Supports*, and indicate whether each was *Effective* or *Not Effective*.

NOTE: It is OK to put things that were not effective here, because it will be important for the next service provider.

Complete the table below by identifying the accommodations and supports that have been tried by teachers or by you (e.g. pacing, extra time, visual supports, adaptive equipment) to help you succeed in school. Please indicate whether each one was effective or not effective.

This information will be saved when you click **Continue** at the bottom of the wizard.

[Click Here to Add meeting notes](#)

Area:

Accommodations and Supports:

Effective

Not Effective

**Step 16b:** When complete, click **Save**.

Area:

Accommodations and Supports:

Effective  
 Not Effective

**Step 17:** Click **Continue**.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

[← Previous](#)  [Continue →](#)

**Step 18:** Select the *Anticipated Exit Reason*.

Student Exited School	
Select one	Anticipated Exit Reason
<input checked="" type="radio"/>	With regular high school diploma
<input type="radio"/>	With certificate/modified diploma
<input type="radio"/>	Reached maximum age
<input type="radio"/>	Dropped out
<input type="radio"/>	Unknown

**Step 19:** Click **Continue**.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

[← Previous](#)  [Continue →](#)

**Step 20:** You can select, modify, and/or delete the personnel contact that will appear on this form.

NOTE: To modify, add, and/or delete personnel contact that will appear on this form see **IEP Form Contacts** for instructions.

**Summary of Performance** Step 9 of 10

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header.

Form Contact List (  Modify ) ( Clear )															
Contact	Sincerely	Personnel	Title(s)												
		Joyce Bogard	<table border="1"> <thead> <tr> <th>Title (Modify)</th> <th>Type</th> <th>Number (Modify)</th> </tr> </thead> <tbody> <tr> <td>LEA Representative</td> <td>Work</td> <td>(510) 358-6547 Ext. 112</td> </tr> <tr> <td>Speech Language Pathologist</td> <td></td> <td></td> </tr> <tr> <td>Student Teacher</td> <td></td> <td></td> </tr> </tbody> </table>	Title (Modify)	Type	Number (Modify)	LEA Representative	Work	(510) 358-6547 Ext. 112	Speech Language Pathologist			Student Teacher		
Title (Modify)	Type	Number (Modify)													
LEA Representative	Work	(510) 358-6547 Ext. 112													
Speech Language Pathologist															
Student Teacher															

**Step 21:** When complete, click **Continue**, then **Save**.

Continue - Please continue the wizard.
   
 Cancel - Please exit the wizard.

← Previous
⊘ Cancel
Save →

**Step 22:** Select the response given by the student.

NOTE: The *Post-School Data Collection Survey* is taken one year after the student has left or graduated high school.

Please select the response given by the student to whether we may have the student's or the parents' permission to be contacted by the school district one year after you leave to ask questions about what the student is doing?

[Click Here to Add meeting notes](#)

Select	Response
<input type="radio"/>	The parent/guardian has not received this form yet.
<input type="radio"/>	The student or parent/guardian gave permission to be contacted by the student's school district one year after leaving to ask some questions about what the student is doing?
<input type="radio"/>	The student or parent/guardian did not give permission to be contacted by the student's school district one year after leaving to ask some questions about what the student is doing?

Date Signed:  MM/DD/YYYY

Show Audit Trail

Save - Please save this form.
   
 Save and Preview - Please save this form and open the preview of the form.
   
 Cancel - Please exit the wizard.

← Previous
⊘ Cancel
Save →

**Step 23:** Enter the *Date Signed*.

Date Signed  MM/DD/YYYY

**Step 24:** To save the form, click **Save**.

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save →](#)

# Autism Considerations

**Step 1:** From the *Other Forms* tab, click on the **Autism Considerations** form.



**Step 2:** This will open the *Autism Considerations* form.

In the development of the individualized education program for a student who has disability on the autism spectrum, the IEP team shall consider all the following factors. [Help](#)

[Click Here to Add meeting notes](#)

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs		
Social interaction skills and proficiencies		
Needs resulting from unusual responses to sensory experience		
Needs resulting from resistance to environmental change or change in daily routines		
Needs resulting from engagement in repetitive activities and stereotyped movements		
Needs for any positive behavioral interventions, strategies and supports		
Other needs which impact progress in general curriculum, including social and emotional development		

**Step 3:** Enter the *Students Needs* and *Supports Identified* for *Verbal and nonverbal communication needs*.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs		

**Step 4:** Enter the *Student Needs* and *Supports Identified* for the student's *Social interaction skills and proficiencies*.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs	↓	↓
Social interaction skills and proficiencies		

**Step 5:** Enter the *Student Needs* and *Supports Identified* for the student's *Needs resulting from unusual responses to sensory experience*.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs	↓	↓
Social interaction skills and proficiencies	↓	↓
Needs resulting from unusual responses to sensory experience		

**Step 6:** Enter the *Student Needs* and *Supports Identified* for the student's *Needs resulting from resistance to environmental change or change in daily routines*.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs	↓	↓
Social interaction skills and proficiencies		
Needs resulting from unusual responses to sensory experience	↓	↓
Needs resulting from resistance to environmental change or change in daily routines		

**Step 7:** Enter the *Student Needs* and *Supports Identified* for the student's *Needs* resulting from engagement in repetitive activities and stereotyped movements.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs		
Social interaction skills and proficiencies		
Needs resulting from unusual responses to sensory experience		
Needs resulting from resistance to environmental change or change in daily routines		
Needs resulting from engagement in repetitive activities and stereotyped movements		

**Step 8:** Enter the *Student Needs* and *Supports Identified* for the student's *Needs* for any positive behavioral interventions, strategies and supports.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs		
Social interaction skills and proficiencies		
Needs resulting from unusual responses to sensory experience		
Needs resulting from resistance to environmental change or change in daily routines		
Needs resulting from engagement in repetitive activities and stereotyped movements		
Needs for any positive behavioral interventions, strategies and supports		

**Step 9:** Enter the *Student Needs* and *Supports Identified* for the student's *Other needs which impact progress in general curriculum, including social and emotional development*.

Autism Considerations		
Factors	Student Needs	Supports Identified
Verbal and nonverbal communication needs		
Social interaction skills and proficiencies		
Needs resulting from unusual responses to sensory experience		
Needs resulting from resistance to environmental change or change in daily routines		
Needs resulting from engagement in repetitive activities and stereotyped movements		
Needs for any positive behavioral interventions, strategies and supports		
Other needs which impact progress in general curriculum, including social and emotional development		

**Step 10:** To save the form, click **Save**.

Save - Please save this form.  
 Save and Preview - Please save this form and open the preview of the form.  
 Cancel - Please exit the wizard.

← Previous
Cancel
Save Now
Save →



## Add Meeting Notes

**Step 1:** Click on the form from the meeting you would like to add the meeting notes to.

NOTE: You will be able to add meeting notes to any IEP form in I-Star.

The screenshot shows the 'IEP Conference' interface. On the left, there is a sidebar with options: Edit Meeting, Meeting Attendees, Print Meeting Forms, Print Meeting Attendees, Add Form to Meeting, and Make Meeting Official. The main area displays conference details: Conference: Conference to discuss DemoMckenzie Magda Watson's IEP, Purpose: Review your child's need for special education and related services and placement and develop an initial IEP, Date: 8/27/2018 8:00:00 AM, Location: (blank), Attendee Count: 5, Form Count: 19, Cancelled: No, and Details: Review the child's need for special education and related services and placement and develop an initial IEP. Below this, there is a link: 'Click Here to Hide All the Forms Associated with the Meeting'. A list of forms is shown below, with the first form 'Form 34-54A: Documentation of Evaluation Results' highlighted with a red box. Other form details include Date: 08/27/2018, Status: Draft, and Update Info: Long, Train01Lauren - 8/27/2018 10:06:50 AM.

**Step 2:** At the top of every page, you will select *Click Here to Add meeting notes* to the desired pages you would like to add a note to.

The screenshot shows the 'Documentation of Evaluation Results' form, labeled 'Step 2 of 3'. The text on the page reads: 'Complete this page after an initial evaluation, reevaluation, or review of an independent or outside evaluation. If prior to the meeting the parent(s) obtained an independent or outside evaluation, the team must document consideration of the evaluation.' Below this, it says: 'This information will be saved when you click Continue at the bottom of the wizard.' At the bottom of the form, there is a link: 'Click Here to Add meeting notes', which is highlighted with a red box.

**Step 3:** Type the desired text.

The screenshot shows the 'Documentation of Evaluation Results' form, labeled 'Step 2 of 3'. The text on the page is the same as in the previous screenshot. Below the text, there is a text box containing the note: 'Elodie's father, Mr. Howard was in attendance. He expressed his wish for Elodie to be involved in the available reading groups to improve her reading fluency.' The text box is highlighted with a yellow background.

**Step 4:** The note will automatically be saved when you click continue at the bottom of the screen and proceed throughout the wizard.



The image shows a horizontal navigation bar for a wizard. It contains three radio buttons at the top, each with a label: "Continue - Please continue the wizard.", "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard.". Below the radio buttons are four buttons: "Previous" with a left-pointing arrow, "Cancel" with a crossed-out circle icon, "Save Now" with a floppy disk icon, and "Continue" with a right-pointing arrow. Red boxes highlight the "Continue" radio button and the "Continue" button.

Continue - Please continue the wizard.

Save and Exit - Please save this form and exit the wizard.

Cancel - Please exit the wizard.

[← Previous](#) [Cancel](#) [Save Now](#) [Continue →](#)

# Making an Entire Meeting Official

To make the entire meeting official, follow the steps below:

NOTE: You must designate the *IEP Case Manager* from the *Access List* before you can mark an IEP official. See [Adding Users to the Access List](#)

**Step 1:** To make the meeting official, select **Make Meeting Official** in the *Pink IEP Conference* box.

NOTE: Once an IEP has been made official, you will not be able to edit the information.

The screenshot displays the 'IEP Conference' management interface. At the top, there are tabs for 'IEP Overview', 'IEP Timeline', 'Print History', 'Activity Log', and 'Attachments'. Below the tabs is a toolbar with buttons for 'Add Form', 'Print IEP', 'Setup a Conference', and 'Delete/Hide IEP Package'. The main content area is titled 'IEP Conference' and contains a pink box with the following details:

- Edit Meeting** (pencil icon)
- Meeting Attendees** (people icon)
- Print Meeting Forms** (print icon)
- Print Meeting Attendees** (print icon)
- Add Form to Meeting** (plus icon)
- Make Meeting Official** (checkbox icon, highlighted with a red box)

Conference details:

- Conference: **Conference to discuss DemoLyndon Hubert Butler's IEP.**
- Purpose: **Review and/or revise your child's IEP to determine special education and related services and placement.**
- Date: **5/16/2018 8:00:00 AM**
- Location:
- Attendee Count: **5**
- Form Count: **11**
- Cancelled: **No**
- Details: Review and/or revise the child's IEP to determine special education and related services and placement. (e.g. Termination of Placement, Aging Out)

Below the pink box is a link: [Click Here to Hide All the Forms Associated with the Meeting](#). The interface then lists two forms:

Form	Date	Status	Update Info
Form 34-54G: <b>Present Levels of Academic Achievement and Functional Performance</b>	<b>05/16/2018</b>	<b>Draft</b>	<b>Long, Train01Lauren - 5/17/2018 8:54:09 AM</b>
Form 34-54J: <b>Functional Behavioral Assessment</b>	<b>05/16/2018</b>	<b>Draft</b>	<b>Long, Train01Lauren - 5/16/2018 2:37:54 PM</b>

**Step 2:** When making the meeting official, I-Star will go through an error checking process of the forms that are associated with that meeting.

Forms with Draft Status						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li>The required field IEP Case Manager Flag is missing. You must supply data for this field.</li> </ul>	05/16/2018	Form 37-44	Conference Summary
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-57D	Notification of Conference
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54V	Autism Considerations
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54S	Additional Notes/Information
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54P	Educational Services and Placement
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54O	Assessment
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54N	Educational Accommodations and Support
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54M	Goals and Objectives
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54K-L	Behavioral Intervention Plan
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54J	Functional Behavioral Assessment
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54G	Present Levels of Academic Achievement and Functional Performance

Check Mark(s) indicate the Form(s) has passed the error checking

**Step 3:** If any errors are found, the RED icon will appear.

Forms with Draft Status						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li>The required field IEP Case Manager Flag is missing. You must supply data for this field.</li> </ul>	05/16/2018	Form 37-44	Conference Summary
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-57D	Notification of Conference
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54V	Autism Considerations
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54S	Additional Notes/Information
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54P	Educational Services and Placement
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54O	Assessment
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54N	Educational Accommodations and Support
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54M	Goals and Objectives
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54K-L	Behavioral Intervention Plan
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54J	Functional Behavioral Assessment
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54G	Present Levels of Academic Achievement and Functional Performance

NOTE: All errors must be corrected to make an individual form and/or meeting official.

NOTE: You will receive the highlighted area below if you do NOT have an IEP Case Manager designated in the Access List located under the IEP Overview Tab.

To add an *IEP Case Manager* to the *Access List*, see [Adding Users to the Access List](#).

View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	• The required field IEP Case Manager Flag is missing. You must supply data for this field.	05/16/2018	Form 37-44	Conference Summary
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-57D	Notification of Conference
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54V	Autism Considerations

Profile | Current/Create IEP | Archived IEPs | Activity Log

Student: DemoLyndon Hubert Butler      SIS ID: 999999019      DOB: 11/17/2008 (9 yrs 6 mos)

IEP Overview | IEP Timeline | Print History | Activity Log | Attachments

Add Form | Print IEP | Setup a Conference | Delete/Hide IEP Package

IEP: (Select Others)  
 Year: 2018  
 IEP Status: Draft  
 Resident District: Harrisburg CUSD 3  
 IEP Start Date:  
 Annual Review Date:  
 Evaluation Dates:  
 Anticipated Graduation Date: 6/5/2027

Disabilities: **Disabilities** (Modify)

Type	Disability
Primary Disability	
Secondary Disability	

Access List: **Access List** (Modify)

Name	Entity	Read-Only	Notifications	Make Forms Official	Will Attend Meetings	IEP Case Manager
Bailey, Train11Chelsey	Norris City Annex	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Long, Train01Lauren	Norris City Annex	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 4:** To correct the errors on the form, click on the **RED** icon.

View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	• The required field IEP Case Manager Flag is missing. You must supply data for this field.	05/16/2018	Form 37-44	Conference Summary
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-57D	Notification of Conference
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54V	Autism Considerations

**Step 5:** Once all errors are corrected and have *Passed Edits*, you can make the meeting official.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 37-44	Conference Summary
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-57D	Notification of Conference
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54V	Autism Considerations
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54S	Additional Notes/Information
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54P	Educational Services and Placement
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54O	Assessment
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54N	Educational Accommodations and Support
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54M	Goals and Objectives
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54K-L	Behavioral Intervention Plan
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54J	Functional Behavioral Assessment
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54G	Present Levels of Academic Achievement and Functional Performance

**Step 6:** All forms listed in the meeting must be checked to *Make Official* to allow the entire meeting to become official.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 37-44	Conference Summary
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-57D	Notification of Conference
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54V	Autism Considerations
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54S	Additional Notes/Information
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54P	Educational Services and Placement
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54O	Assessment
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54N	Educational Accommodations and Support
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54M	Goals and Objectives
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54K-L	Behavioral Intervention Plan
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54J	Functional Behavioral Assessment
(0)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		05/16/2018	Form 34-54G	Present Levels of Academic Achievement and Functional Performance

**Step 7:** Click **Change Status**.



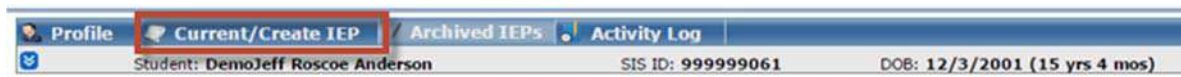


# Annual Review

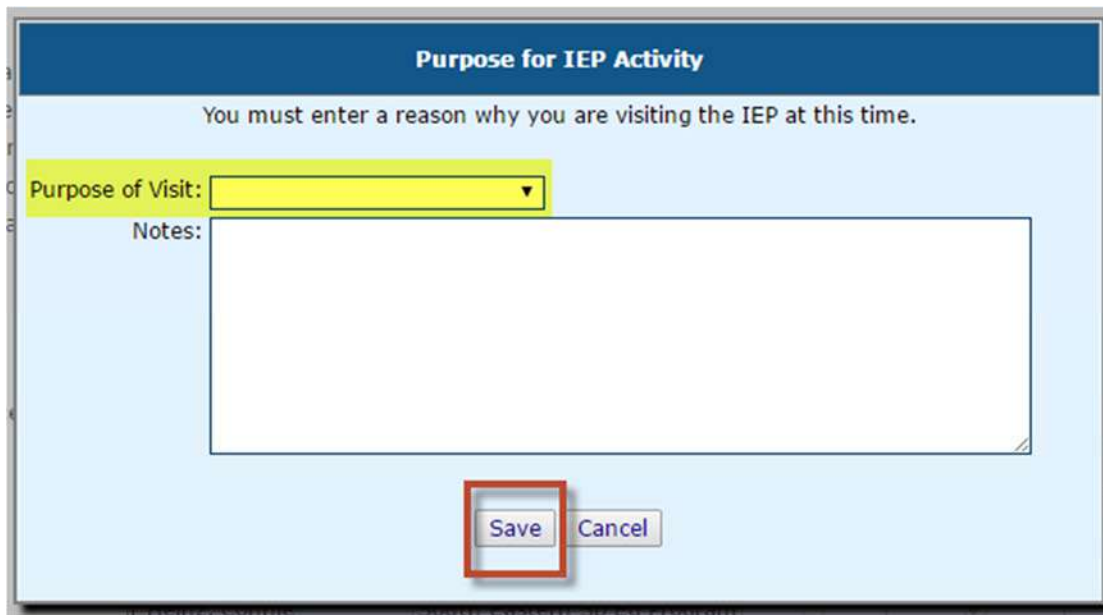
If a student has an existing IEP in I-Star, you will use the *Annual Review* option from *Current/Create IEP*. Follow steps 1-7 below.

NOTE: You should NOT perform the Annual Review or Reevaluation processes unless you have an official IEP for that student and want to create a new IEP Package.

**Step 1:** If a student has an existing IEP in I-Star, from the **Student Profile**, select **Current/Create IEP**.



**Step 2:** Enter a *Purpose of Visit* and click **Save**.

A screenshot of a web form titled 'Purpose for IEP Activity'. The form has a blue header with the title. Below the header, there is a message: 'You must enter a reason why you are visiting the IEP at this time.' The form contains a 'Purpose of Visit:' label followed by a dropdown menu, which is highlighted with a yellow background. Below this is a 'Notes:' label followed by a large, empty text area. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red rectangular box.

**Step 3:** From the *IEP Overview* tab, select **Annual Review**.





**Step 4: Select Resident District.**

Resident District: Harrisburg CUSD 3

**Step 5:** Review the *Access List* to verify that all users on it should remain. You can also add any new users that need access to the student's IEP. See [Adding Users to the Access List](#) for instructions.

**Annual Review**

Please review the access list to make sure they are still appropriate.  
**Saving will begin a new IEP. (If this student already has a draft IEP this may not be necessary)**

Resident District: Harrisburg CUSD 3

**Access List ( + Add)**

Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
		Long, Train01Lauren	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Ortiz, Train03Isabella	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can select a user from the list of common user for your district.

**Common Users**

Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
<input checked="" type="checkbox"/>	Bailey, Train11Chelsey	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save - Please save the IEP Package  
 Cancel - Please exit the wizard.

**Step 6:** SAVING WILL BEGIN A NEW IEP. If you wish to continue, click **Save** once you are satisfied with the *Access List*.

**Annual Review**

Please review the access list to make sure they are still appropriate.  
**Saving will begin a new IEP. (If this student already has a draft IEP this may not be necessary)**

Resident District:

Access List ( + Add)								
Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
		Long, Train01Lauren	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Ortiz, Train03Isabella	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can select a user from the list of common user for your district.

Common Users						
Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
<input checked="" type="checkbox"/>	Bailey, Train11Chelsey	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save - Please save the IEP Package  
 Cancel - Please exit the wizard.

**Step 7:** After clicking the annual review button, the official IEP will be located under the *Achieved IEP* tab. You will then be able to continue by clicking **Setup a Conference** to begin the annual review.

Student: DemoLyndon Hubert Butler      SIS ID: 999999019      DOB: 11/17/2008 (9 yrs 7 mos)

No Form Currently On File for this Package.

**Step 8:** Proceed by following the steps to **Create an IEP**.

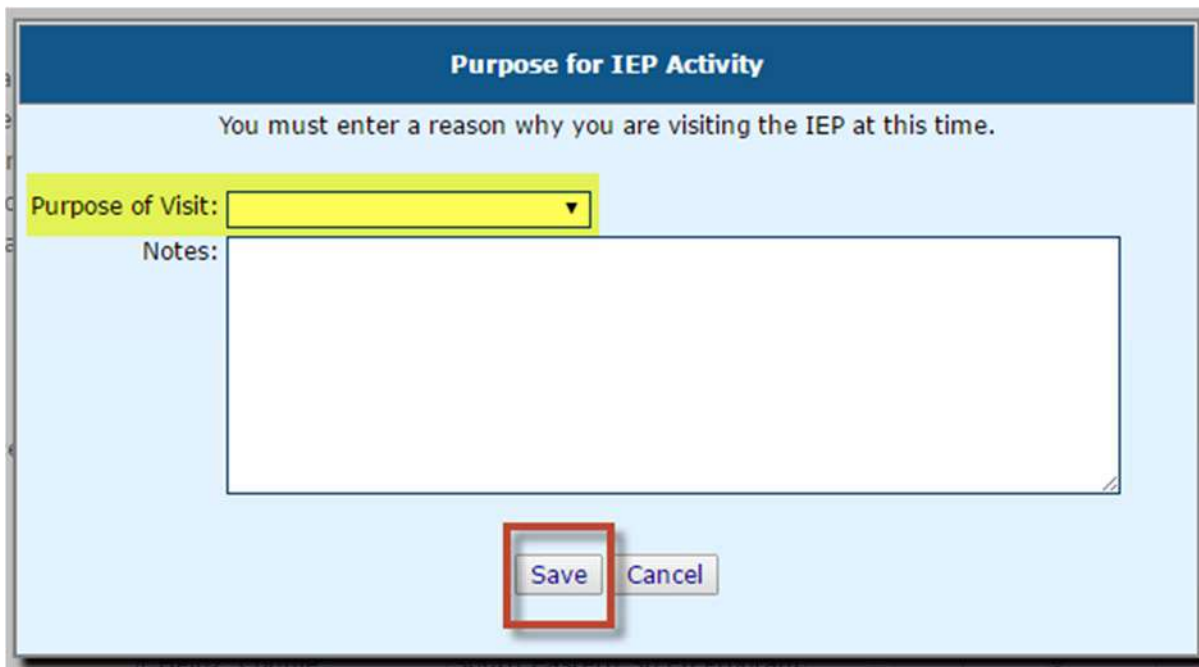
## Reevaluation

NOTE: You should NOT perform the Annual Review or Reevaluation processes unless you have an OFFICIAL IEP for that student and want to create a new IEP Package.

**Step 1:** If a student has an existing IEP in I-Star, from the **Student Profile**, select **Current/Create IEP**



**Step 2:** Enter a *Purpose of Visit* and click **Save**.

A screenshot of a web form titled 'Purpose for IEP Activity'. The form has a blue header with the title. Below the header, there is a message: 'You must enter a reason why you are visiting the IEP at this time.' The form contains a dropdown menu labeled 'Purpose of Visit:' which is highlighted with a yellow box. Below the dropdown is a large text area labeled 'Notes:'. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red box.

**Step 3:** From the *IEP Overview* tab, select **Reevaluation**.

The screenshot shows the 'IEP Overview' tab selected. The student information is: Student: DemoJeff Roscoe Anderson, SIS ID: 999999061, DOB: 12/3/2001 (15 yrs 4 mos). The 'Reevaluation' button is circled in red. Other buttons include 'Add Form', 'Print IEP', 'Setup a Conference', 'Create an Amendment', and 'Annual Review'.

IEP: (Select Others)  
 Year: 2017  
 IEP Status: Official  
 Resident District: Harrisburg CUSD 3

**Step 4:** Select **Resident District**.

Resident District: Harrisburg CUSD 3

**Step 5:** Review the *Access List* to verify that all users on it should remain. You can also **Add** any new users that need access to the student's IEP. See [Adding Users to the Access List](#) for instructions.

**IEP Re-Evaluation**

Please review the access list to make sure they are still appropriate.  
**Saving will begin a new IEP. (If this student already has a draft IEP this may not be necessary)**

Resident District: Harrisburg CUSD 3

**Access List** (+ Add)

Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
		Long, Train01Lauren	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Ortiz, Train03Isabella	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can select a user from the list of common user for your district.

**Common Users**

Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
<input checked="" type="checkbox"/>	Bailey, Train11Chelsey	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 6:** SAVING WILL BEGIN A NEW IEP. If you wish to continue, click **Save** once you are satisfied with the *Access List*.

**IEP Re-Evaluation**

Please review the access list to make sure they are still appropriate.  
**Saving will begin a new IEP. (If this student already has a draft IEP this may not be necessary)**

Resident District:

Access List ( + Add)								
Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
		Long, Train01Lauren	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		Ortiz, Train03Isabella	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can select a user from the list of common user for your district.

Common Users						
Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official	Will Attend Meetings
<input checked="" type="checkbox"/>	Bailey, Train11Chelsey	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save - Please save the IEP Package.  
 Cancel - Please exit the wizard.

**Step 7:** After clicking the annual review button, the official IEP will be located under the *Archived IEP* tab. You will then be able to continue by clicking **Setup a Conference** to begin the annual review.

Profile	Current/Create IEP	Archived IEPs	Activity Log
Student: DemoLyndon Hubert Butler		SIS ID: 999999019	DOB: 11/17/2008 (9 yrs 7 mos)
IEP Overview	IEP Timeline	Print History	Activity Log
Add Form	Print IEP	Setup a Conference	Delete/Hide IEP Package
No Form Currently On File for this Package.			

**Step 8:** Proceed by following the steps to **Create an IEP**.

# Archived IEP

Archiving an IEP is done a variety of ways:

- 1.) When performing the **Annual Review** function, the current IEP is archived when the new IEP is made official.
- 2.) When performing the **Reevaluation** function, the current IEP is archived when the new IEP is made official.
- 3.) If you do NOT wish to use the Annual Review or Reevaluation functions, you can also **Setup a Conference**. The date the new IEP goes into effect, the current IEP will be archived.

To access the archived IEPs, follow the steps below:

**Step 1:** Click **Archived IEPs** in the top toolbar from the **Student Profile** page.



**Step 2:** Here you will see a list of *Archived IEP Packets*.

The screenshot shows the 'Archived IEP Packets' table. A red arrow points to the 'View' icon in the first row. The table has the following structure:

View	Print History	Resident District	Status	Year	IEP Start	IEP End	Not Eligible
		Harrisburg CUSD 3	Official	2016	2/14/2017	2/13/2017	

**Step 2a:** If you would like to view the *Archived IEP Packet*, click the view icon.

The screenshot shows the 'Archived IEP Packets' table. The 'View' icon in the first row is circled in red. The table has the following structure:

View	Print History	Resident District	Status	Year	IEP Start	IEP End	Not Eligible
		Harrisburg CUSD 3	Official	2016	2/14/2017	2/13/2017	

**Step 2b:** To print the archived IEP, click the eye glasses icon.

Archived IEP Packets							
View	Print History	Resident District	Status	Year	IEP Start	IEP End	Not Eligible
		Harrisburg CUSD 3	Official	2016	2/14/2017	2/13/2017	

# Create an Amendment

To create an amendment follow the steps below:

NOTE: You can only create an amendment after IEP is considered official.

**Step 1:** From the **Landing Page**, select the student's name under *My IEP Students*.

My IEP Students			
SISID	Name	IEP Status / Start	Home School
999999061	DemoJeff Roscoe Anderson	Official 2/14/2017	Harrisburg CUSD 3
999999116	DemoRiver Yusuf Bell	Draft	Harrisburg CUSD 3
999999052	DemoGarrett Hendrix Collins	Draft	Harrisburg CUSD 3
999999052	DemoGarrett Hendrix Collins	Official 2/15/2017	Harrisburg CUSD 3
999999001	DemoCash Grant Flores	Draft	
999999001	DemoCash Grant Flores	Draft	

(Page 1 of 1) Page 1 Items Per Page 20

View All

**Step 2:** Click **Current/Create IEP**.

Goal Mine IEP Quality My Students: DemoGarrett Hendrix Collins

Profile **Current/Create IEP** / Archived IEPs Activity Log

Student: DemoGarrett Hendrix Collins SIS ID: 999999052 DOB: 10/15/1999 (17 yrs 5 mos)

**Step 3:** Enter a *Purpose of Visit* and click **Save**.

**Purpose for IEP Activity**

You must enter a reason why you are visiting the IEP at this time.

Purpose of Visit:

Notes:



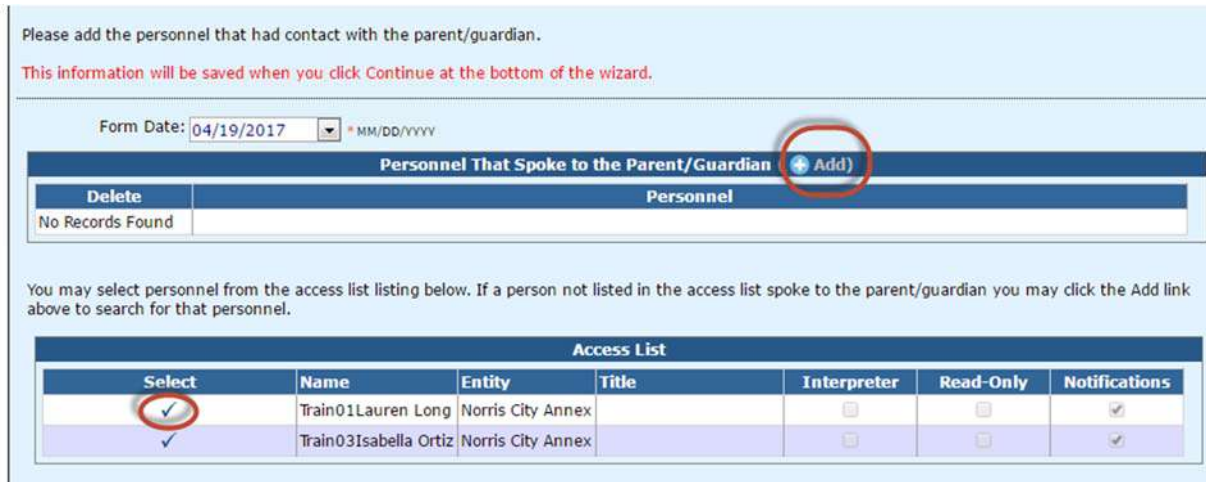
**Step 4:** While in the student's *IEP Timeline* tab, click **Create an Amendment**.



**Step 5:** Enter the *Form Date*.

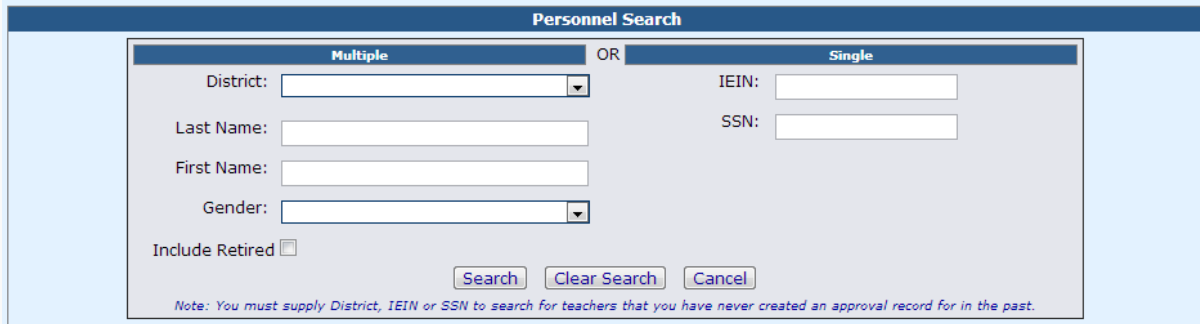


**Step 6:** You may select the check-mark from the access list below or if a person is not listed in the access list that spoke to the parent/guardian you may click **Add**.



NOTE: If you have clicked the **Add** icon, follow steps 6a-6d.

**Step 6a:** Use the *Personnel Search* to find the personnel who spoke with the parent.



The Personnel Search form is titled "Personnel Search" and is divided into two sections: "Multiple" and "Single". The "Multiple" section includes fields for District (a dropdown menu), Last Name, First Name, and Gender (a dropdown menu). The "Single" section includes fields for IEIN and SSN. There is an "Include Retired" checkbox and three buttons: "Search", "Clear Search", and "Cancel". A note at the bottom states: "Note: You must supply District, IEIN or SSN to search for teachers that you have never created an approval record for in the past."

**Step 6b:** If the personnel for whom you are searching appears in the *Personnel Search Results*, click the check-mark under *Select* to select them.

Select	Name	Entity	Title	Interpreter
<input checked="" type="checkbox"/>	Train01Lauren Long	Norris City Annex		<input type="checkbox"/>

**Step 6c:** If the person has already been added to the student's *Access List*, you can simply click the check-mark under *Select* column to add them.

You may select personnel from the access list listing below. If a person not listed in the access list spoke to the parent/guardian you may click the Add link above to search for that personnel.

Access List						
Select	Name	Entity	Title	Interpreter	Read-Only	Notifications
<input checked="" type="checkbox"/>	Wovsed Admin	Wabash & Ohio Valley Sp Ed Dist		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	wovsed1 DistrictDoc1	Norris City Annex		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 6d:** Once you have added the personnel that you need, click **Continue**.



The wizard navigation section contains three radio buttons: "Continue - Please continue the wizard." (selected), "Save and Exit - Please save this form and exit the wizard.", and "Cancel - Please exit the wizard." Below these buttons are two larger buttons: "Cancel" and "Continue" (with a right-pointing arrow).

**Step 7:** Select the *Contact Date*.

Contact Date:  MM/DD/YYYY

Method of Communication	
Relevant	Items
<input type="checkbox"/>	Met in person
<input type="checkbox"/>	Spoke on the phone
<input type="checkbox"/>	Exchanged e-mails/texts
<input type="checkbox"/>	Exchanged faxes

**Step 8:** Select the *Method of Communication* made to the parent/guardian.

Contact Date:  MM/DD/YYYY

Method of Communication	
Relevant	Items
<input type="checkbox"/>	Met in person
<input type="checkbox"/>	Spoke on the phone
<input type="checkbox"/>	Exchanged e-mails/texts
<input type="checkbox"/>	Exchanged faxes

**Step 9:** Click **Continue**.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

**Step 10:** Enter the *Effective Date*.

Effective Date:  MM/DD/YYYY

**Step 11:** Enter the changes that are being made to the student's IEP.

Effective Date:  MM/DD/YYYY

Changes and Explanation of Changes:

**Step 12:** Click **Continue**.

Continue - Please continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

**Step 13:** Select the personnel to be contact and signator for this IEP.

Form Contact List (X Modify) (Clear)					
Contact	Sincerely	Personnel	Title(s)	Phone(s)	
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Johnny Smith	<input type="text" value="Principal"/>	<input type="text" value="Mobile"/>	<input type="text" value="(217) 622-5555"/>

NOTE: To modify, add, and/or delete personnel contact that will appear on this form see [IEP Form Contacts](#) for instructions.

**Summary of Performance** Step 9 of 10

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header.

Form Contact List (X Modify) (Clear)					
Contact	Sincerely	Personnel	Title(s)	Phone(s)	
<input type="radio"/>	<input type="radio"/>	Joyce Bogard	<input type="text" value="LEA Representative"/> <input type="text" value="Speech Language Pathologist"/> <input type="text" value="Student Teacher"/>	<input type="text" value="Work"/>	<input type="text" value="(510) 358-6547 Ext. 112"/>

**Step 14:** When complete, click **Save and Continue**. Next, click **Save**.

Save and Continue - Please save and continue the wizard.  
 Save and Exit - Please save this form and exit the wizard.  
 Cancel - Please exit the wizard.

**Step 15:** Select the form(s) you wish to amend by clicking the check-mark from the *Available Forms* box.

Forms Included in Amendment				
Actions	View Original	View New	Name	Current Errors
No Records Found				

Available Forms				
View	Select	Name	Description	Meeting
	<input checked="" type="checkbox"/>	Form 37-44	Conference Summary	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54A	Documentation of Evaluation Results	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54B	Eligibility Determination (Other than SLD)	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54G	Present Levels of Academic Achievement and Functional Performance	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54J	Functional Behavioral Assessment	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54K-L	Behavioral Intervention Plan	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54M	Goals and Objectives	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54N	Educational Accommodations and Support	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54P	Educational Services and Placement	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54Q	Educational Services and Placement (Page 2)	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54S	Additional Notes/Information	06/12/20
	<input checked="" type="checkbox"/>	Form 34-54V	Autism Considerations	06/12/20

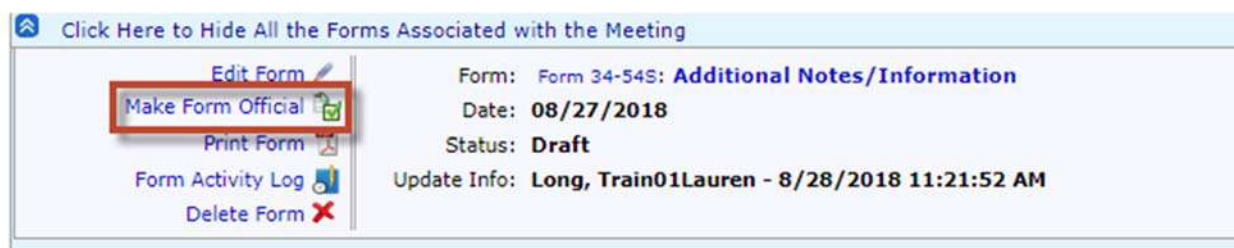
**Step 16:** When complete, click **Return**.




## Make Individual Form Official


**NOTE:** Once and IEP gets a start date, it becomes official. There are a few forms that will provide a start date, mainly the forms in sequence after the Data Chats. (With the exception of the Progress Reports.) The status of the IEP isn't affected by the present or absence of any singular form. Marking one of these forms official sets the start date of the whole IEP.


**Step 1:** To make an individual form official, click **Make Form Official** to the left of the form description.





Click Here to Hide All the Forms Associated with the Meeting

Edit Form 

**Make Form Official** 

Print Form 

Form Activity Log 

Delete Form 

Form: Form 34-54S: **Additional Notes/Information**

Date: **08/27/2018**

Status: **Draft**

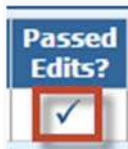
Update Info: **Long, Train01Lauren - 8/28/2018 11:21:52 AM**

**Step 2:** The form you have selected to make official will go through a list of error checks.

**NOTE:** A RED icon will indicate there are errors, which needs to be corrected before making the form official. The error description will be listed next to the red icon.



**NOTE:** A check mark will represent the form has *Passed Edits*.



**Step 3:** Once the form has passed the error check, you can select the form to change its status to official.

Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
 (0)	<input checked="" type="checkbox"/>	✓		08/27/2018	Form 34-54S	Additional Notes/Information

**Step 4:** Click **Change Status**.



**Step 5:** Enter the *Official Start Date* for this IEP.

A screenshot of a form with a dark blue header that reads 'Please Enter the Official Start Date for this IEP'. Below the header, the text 'Start Date:' is followed by a date input field with a dropdown arrow and a red asterisk, and the text '\* MM/DD/YYYY'. The input field is circled in red.

**Step 6:** Click **Save**.



NOTE: You will also notice the *Status* of the form was changed from *Draft* to *Official*.

A screenshot of a form details panel. At the top, there is a link: 'Click Here to Hide All the Forms Associated with the Meeting'. Below this, there are two columns. The left column contains 'Print Form' with a printer icon and 'Form Activity Log' with a document icon. The right column contains the following information: 'Form: Form 34-54S: Additional Notes/Information', 'Date: 08/27/2018', 'Status: Official' (highlighted in yellow), and 'Update Info: Long, Train01Lauren - 8/28/2018 11:23:46 AM'.

# Print IEP

**Step 1:** Go to the **Student's Profile** of the student's IEP you wish to print.



**Step 2:** Click the **Current/Create IEP** tab.



**Step 3:** Enter a *Purpose of Visit* and click **Save**.

A screenshot of the 'Purpose for IEP Activity' form. The form has a blue header with the title 'Purpose for IEP Activity'. Below the header, there is a message: 'You must enter a reason why you are visiting the IEP at this time.' The form contains a 'Purpose of Visit:' dropdown menu, which is highlighted in yellow. Below the dropdown is a 'Notes:' text area. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red box.



**Step 4:** Select the **IEP Timeline** tab.



**Step 5:** Click **Print IEP**.



**Step 6:** Choose from the following *IEP Print Options*.

A dialog box titled 'IEP Print Options' with a blue header. It is divided into three main sections: 'Form Status', 'Form Type', and 'Configuration'.  
**Form Status:** Contains radio buttons for 'Official' and 'Review'. Under 'Official', there are checkboxes for 'Include cover page' and 'Include Procedural Safeguards (print now)'. Under 'Review', there is a text label 'Include forms with the following status:' followed by radio buttons for 'Both Official and Draft', 'Official Only', and 'Draft Only'.  
**Form Type:** Contains radio buttons for 'IEP Forms Only', 'Consent Forms Only', and 'Both IEP and Consent Forms'.  
**Configuration:** Contains two items: 'Cover Page (configure)' and 'Letter Head (configure)'.  
At the bottom of the dialog are three buttons: 'Help', 'OK', and 'Cancel'.

**Step 7:** Select the *Form Status*.



**Form Status**

- Official
  - Include cover page
  - Include Procedural Safeguards ([print now](#))
- Review
  - Include forms with the following status:
    - Both Official and Draft
    - Official Only
    - Draft Only

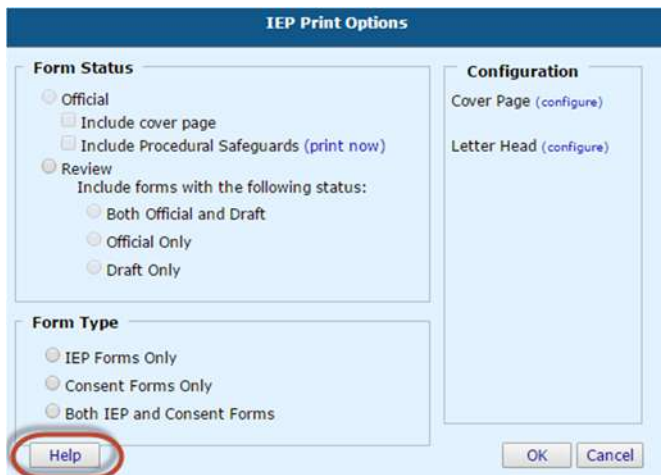
**Step 8:** Select desired *Form Type*.



**Form Type**

- IEP Forms Only
- Consent Forms Only
- Both IEP and Consent Forms

**Step 9:** For further explanation on the *Form Status* and *Form Type*, click **Help**.



**IEP Print Options**

**Form Status**

- Official
  - Include cover page
  - Include Procedural Safeguards ([print now](#))
- Review
  - Include forms with the following status:
    - Both Official and Draft
    - Official Only
    - Draft Only

**Form Type**

- IEP Forms Only
- Consent Forms Only
- Both IEP and Consent Forms

**Configuration**

Cover Page ([configure](#))

Letter Head ([configure](#))

**Print Entire IEP Help**

**Form Status**

When printing an entire IEP the user has the option to choose *Official* or *Review*.

**Official:** When *Official* is chosen only document's that have a form status of official will be merged into the PDF document that is created. Documents with a status of draft are always omitted. Furthermore, when *Official* is chosen the REVIEW watermark is omitted from the documents. This is the only time the system will generate the documents without the REVIEW watermark. And finally, *Official* indicates that a snapshot of the document containing all official documents merged as one will be created and stored in the IEP Package Print History for future review. This documents represents an official IEP that was presented to and used by the IEP team and all other parties involved with the student's IEP. Once the snapshot is created it will never change and may never be removed from the system.

**Review:** When *Review* is chosen the user is indicating that they wish to view the IEP in its entirety, but not as an official version. When *Review* is chosen all documents that are included will contain a REVIEW watermark. The only method to create a document without the REVIEW watermark is to Print the Entire IEP and choose Official. Finally, when *Review* is chosen the system will not create a snapshot of the document.

**Review Options:** When *Review* is chosen the user has the option to chose what forms to include in the document based on their status. The user may choose to include all documents by selecting Both Official And Draft. The user may also only include Official Form or Draft forms by choosing the applicable option. Please note that when *Official* is chosen as the print option only documents with a form status of official are included.

**Form Type**

When printing an entire IEP the user has the option to choose *IEP Forms*, *Consent Forms* or *Both IEP and Consent Forms*.

**IEP Forms:** Only IEP type forms (37-44) will be included. All Consent type forms (34-57) will be excluded.

**Consent Forms:** Only Consent type forms (34-57) will be included. All IEP type forms (37-44) will be excluded.

**Both IEP And Consent Forms:** Both IEP type forms (37-44) and Consent type forms (34-57) will be included.

**Step 10:** To add an image for *Cover Page*, click **Configure**. See [Configuring a Cover Page](#) for instructions.

NOTE: Only IEP administrators will be able to configure a cover page.

**Configuration**

Cover Page (configure)

Letter Head (configure)

**Step 11:** To add an image for *Letter Head*, click **Configure**. Click [Configuring Letter Head](#) for instructions.

NOTE: Only an IEP administrators will be able to configure a letter head.



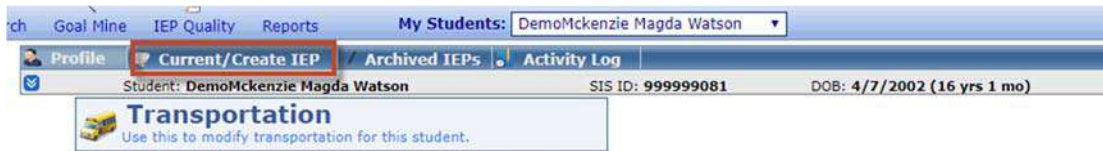
**Step 12:** When complete and ready to print, click **OK**.



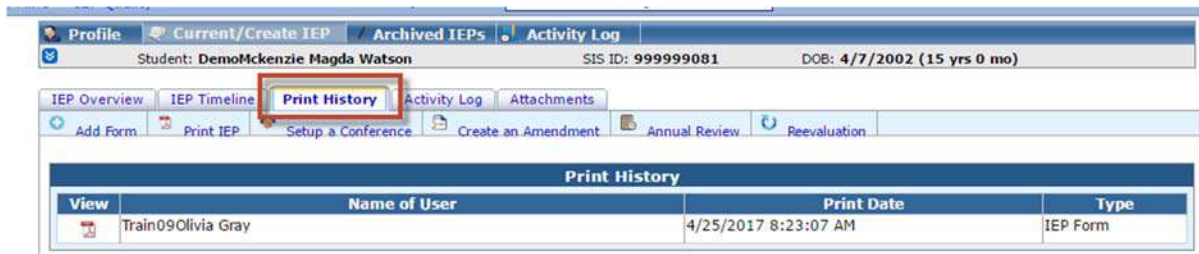
# Print History

To view the student's IEP print history follow the steps below:

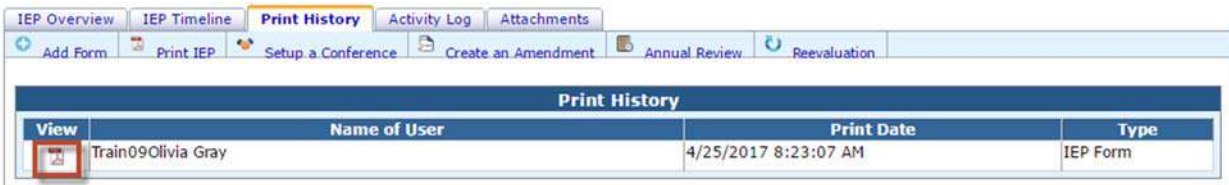
**Step 1:** From the **Student Profile** page, click **Current/ Create IEP**.



**Step 2:** Select the **Print History** tab.



**Step 3:** To view the student's *IEP Print History* form, click the view icon.



## Adding Attachments to the IEP

NOTE: Occasionally there will be portions of an IEP that are not reflected in the forms alone. These additional documents can be uploaded to the I-Star system for these situations.

**Step 1:** From the **Landing Page**, select the student's name under *My IEP Students*.

My IEP Students			
SISID	Name	IEP Status / Start	Home School
999999021	DemoRiley Saffron Bennett	Draft	
999999077	DemoAl Jefferson Long	Draft	Harrisburg CUSD 3

(Page 1 of 1) Page 1 Items Per Page 20

View All

**Step 2:** Click **Current/Create IEP**.

Profile	<b>Current/Create IEP</b>	Archived IEPs	Activity Log
Student: DemoRiley Saffron Bennett		SIS ID: 999999021	DOB: 9/12/1998 (18 yrs 6 mos)

**Step 3:** Enter a *Purpose of Visit* and click **Save**.

### Purpose for IEP Activity

You must enter a reason why you are visiting the IEP at this time.

Purpose of Visit:

Notes:

**Step 4:** Click the **Attachments** tab.



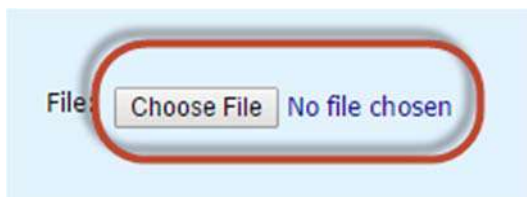
**Step 5:** Click **Add**.



**Step 6:** Enter a *Title* and *Description* for the document.

A screenshot of a form for adding a document. The form has a light blue background. On the left, there are two labels: 'Title:' and 'Description:'. To the right of these labels is a large text input area. Below the input area, there is a 'File:' label followed by a 'Choose File' button and the text 'No file chosen'. The entire form area is highlighted with a red border.

**Step 7:** To upload a file, click *Choose File*.



**Step 8:** Search *File Name*, Select File, and click **Open**.



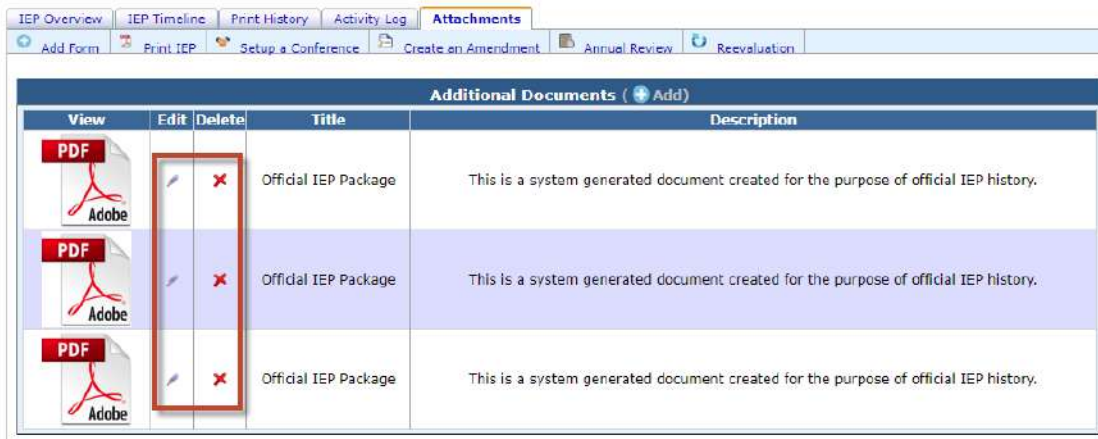
**Step 9:** This will upload the file you have chosen.












**Step 10:** Select **Import**, then **Save**.



**Step 11:** Once the attachment is saved, you can view, edit and/or delete from the *Attachments* tab for that student.



View	Edit	Delete	Title	Description
			Official IEP Package	This is a system generated document created for the purpose of official IEP history.
			Official IEP Package	This is a system generated document created for the purpose of official IEP history.
			Official IEP Package	This is a system generated document created for the purpose of official IEP history.



# Activity Log

**Step 1:** Click **Activity Log** to access the *Log Book*.



**Step 2:** From here, you can see the *Log Book*. This shows the *User Name*, *Log Date*, *Type of navigation*, *Reason* for visiting the IEP, and the *Activity Count*.

The screenshot shows the 'Student Log Book' table. The 'Log Book' tab is highlighted with a red box. The table has columns for 'User Name', 'Log Date', 'Type', 'Reason', and 'Activity Count'. The 'View' dropdown is set to '20'. The table contains 8 rows of activity log entries.

User Name	Log Date	Type	Reason	Activity Count
Train01Lauren Long (Coop User)	04/20/2017	Screen Navigation	Review/Print the IEP	5
Train01Lauren Long (Coop User)	04/20/2017	Screen Navigation		19
Train01Lauren Long (Coop User)	04/20/2017	Printed IEP		1
Train01Lauren Long (Coop User)	04/19/2017	Screen Navigation	Review/Print the IEP	12
Train01Lauren Long (Coop User)	04/19/2017	Screen Navigation		8
Train01Lauren Long (Coop User)	04/19/2017	Data Transaction		5
Train01Lauren Long (Coop User)	04/11/2017	Screen Navigation	Review/Print the IEP	3
Train01Lauren Long (Coop User)	04/11/2017	Screen Navigation		3

**Step 3:** Click the *Details* tab to *Filter Activity Log*.

The screenshot shows the 'Filter Activity Log' form. The 'Details' tab is highlighted with a red box. The form has fields for 'Begin Date' (04/18/2018), 'End Date' (05/02/2018), and 'User' (a dropdown menu). A 'Search' button is located below the 'End Date' field.

**Step 3a:** You can choose to search by *begin date*, *end date*, and *user*.

The screenshot shows the 'Filter Activity Log' form with the 'Begin Date', 'End Date', and 'User' fields highlighted in yellow. The 'Search' button is also visible.

**Step 3b:** Choose the *Activity Items* that you would like to appear in the results.

**Filter Activity Log**

Begin Date: 04/18/2018 End Date: 05/02/2018 User: [Dropdown]

MM/DD/YYYY MM/DD/YYYY Search

**Student Activity Logs**

**Filters**  
Begin Date: 4/18/2018  
End Date: 5/2/2018

**Activity Items**

- Data Transactions
- Printed IEPs
- Screen Navigations

You must select an Activity Item to view.

**Step 3c:** The log will then appear.

**Filter Activity Log**

Begin Date: 04/18/2018 End Date: 05/02/2018 User: [Dropdown]

MM/DD/YYYY MM/DD/YYYY Search

**Student Activity Logs**

**Filters**  
Begin Date: 4/18/2018  
End Date: 5/2/2018

**Activity Items**

- Data Transactions
- Printed IEPs
- Screen Navigations
  - Adverse Effects
  - Amendment Forms
  - Conference Attendees
  - Conference Summary
  - Eligibility Determination
  - Eligibility Determination Factors
  - Form Summary
  - Forms Assistant**
  - Iep Packages
  - Parent/Guardian recocation of consent.
  - Profile
  - Progress Report
  - Progress Report
  - Remove Guardian
  - Select Form

**Screen Navigations for Forms Assistant**

User Name	Page View Date	Reason
Train15Jess Brown (Coop User)	5/2/2018 1:47:52 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 1:47:51 PM	
Train15Jess Brown (Coop User)	5/2/2018 1:44:38 PM	Create Official Amendment
Train15Jess Brown (Coop User)	5/2/2018 1:44:38 PM	Create Official Amendment
Train15Jess Brown (Coop User)	5/2/2018 1:44:17 PM	Create Official Amendment
Train15Jess Brown (Coop User)	5/2/2018 1:44:17 PM	Create Official Amendment
Train15Jess Brown (Coop User)	5/2/2018 1:39:53 PM	
Train15Jess Brown (Coop User)	5/2/2018 1:39:53 PM	Create Official Amendment
Train15Jess Brown (Coop User)	5/2/2018 11:10:16 AM	
Train15Jess Brown (Coop User)	5/2/2018 11:10:16 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:14:17 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:14:17 AM	
Train15Jess Brown (Coop User)	5/2/2018 10:10:19 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:10:19 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:08:55 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:08:55 AM	
Train15Jess Brown (Coop User)	5/2/2018 10:08:40 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:08:40 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:07:47 AM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/2/2018 10:07:47 AM	
Train15Jess Brown (Coop User)	5/1/2018 3:13:32 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 3:13:32 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 3:13:24 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 3:13:24 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 3:11:42 PM	
Train15Jess Brown (Coop User)	5/1/2018 3:11:42 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 1:14:54 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 1:14:54 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 1:13:05 PM	Draft/Create the IEP
Train15Jess Brown (Coop User)	5/1/2018 1:13:05 PM	Draft/Create the IEP

# IEP Reports

**Step 1:** To access IEP reports, click the **Reports** tab.

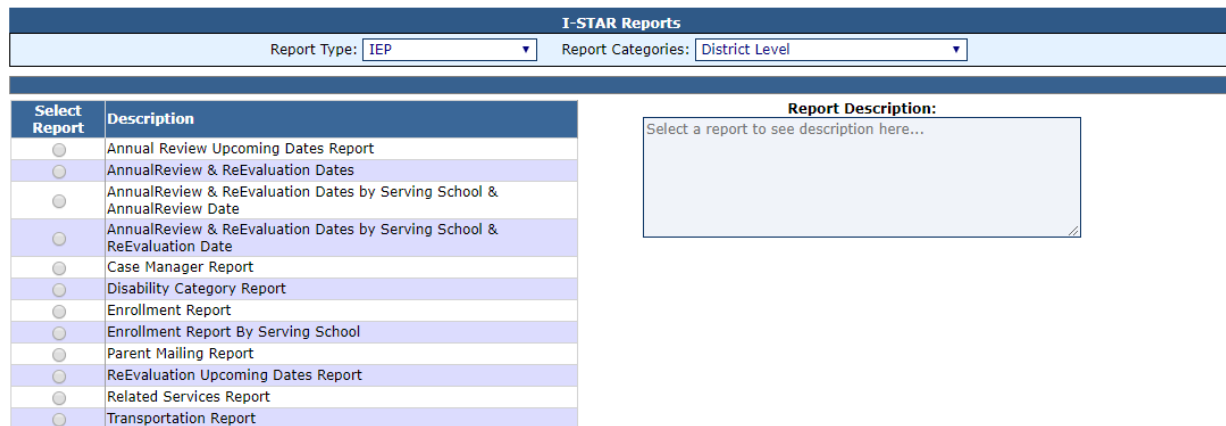
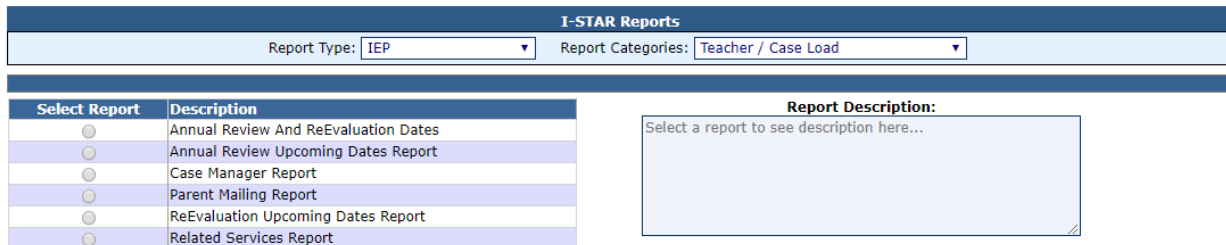


**Step 2:** Under *I-STAR Reports*, select **IEP** for the *Report Type*.



**Step 3:** Select either **Teacher/Case Load** or **District Level** from the drop-down menu for the *Report Categories*.

NOTE: Depending on your *Report Categories* selection, this will populate different reports.



**Step 3:** Under the *Select Report* column, click the correct *Description* of the report you are wanting to run and/or export.

**I-STAR Reports**

Report Type:  Report Categories:

Select Report	Description
<input type="radio"/>	Annual Review And ReEvaluation Dates
<input type="radio"/>	Annual Review Upcoming Dates Report
<input type="radio"/>	Case Manager Report
<input type="radio"/>	Parent Mailing Report
<input type="radio"/>	ReEvaluation Upcoming Dates Report
<input type="radio"/>	Related Services Report

**Report Description:**  
Select a report to see description here...

**I-STAR Reports**

Report Type:  Report Categories:

Select Report	Description
<input type="radio"/>	Annual Review Upcoming Dates Report
<input type="radio"/>	AnnualReview & ReEvaluation Dates
<input type="radio"/>	AnnualReview & ReEvaluation Dates by Serving School & AnnualReview Date
<input type="radio"/>	AnnualReview & ReEvaluation Dates by Serving School & ReEvaluation Date
<input type="radio"/>	Case Manager Report
<input type="radio"/>	Disability Category Report
<input type="radio"/>	Enrollment Report
<input type="radio"/>	Enrollment Report By Serving School
<input type="radio"/>	Parent Mailing Report
<input type="radio"/>	ReEvaluation Upcoming Dates Report
<input type="radio"/>	Related Services Report
<input type="radio"/>	Transportation Report

**Report Description:**  
Select a report to see description here...

**Step 4:** Click either **Run Report** or **Export Report**.

**Reports Filters**

Run Report

Export Report

# IEP-Q

The IEP-Q is an excellent resource for all the teachers. This website is recommended if you need ideas and/or support on how to complete the sections or any of the sections in the IEP forms. It is encouraged you to register for the IEP-Q website. To register, see the link below:

<https://iepq.education.illinois.edu/>

The screenshot shows the IEP-Q website interface. At the top left is the logo for the IEP Quality Project. To the right, there is a user login area with a "Welcome" message and a "logout" button. Below this is a search bar labeled "SEARCH-x:" with a "go" button. A horizontal navigation menu contains links for "home", "toolbox", "student scenarios", "resource library", "myIEP-Q", "isbe", and "help".

On the left side, there is a vertical menu with a link to "Take a tour of the IEP-Q Tutorial!". Below this are several categories: "Evaluation & Reevaluation", "Present Levels of Academic Achievement & Functional Performance", "Goals and Objectives/Benchmarks", "Educational Accommodations & Supports", "Education Services & Placement", "Assessment", "Transition", "Behavior", "Other Topics", "Standards-Aligned Goals and Objectives", "Social Work / Speech Language", "Formative Assessment", and "Common Core State Standards".

The main content area features three large colored boxes: a purple "TOOLBOX" box containing text about goal assistant links and planning sheets, a teal "RESOURCE LIBRARY" box about information sources, and a blue "STUDENT SCENARIOS" box about fictionalized student examples. Below these is a section titled "Find Help Creating Quality IEPs" with a brief description and a bulleted list of actions users can take.

At the bottom, there is a copyright notice for 2007, a thank you message to project partners, and a footer with contact information for the National Center for Special Education Research and a link to the "IEP-Q Grant Staff List".

## Notice & Consent Instructions

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Select the link below to view the **Notice & Consent Instructions** provided by the *Illinois State Board of Education*.

Including the Explanation of Procedural Safeguards (34-57J) (all forms provided in Arabic, Chinese, English, Gujarati, Korean, Polish, Russian, Spanish, Tagalog, Urdu, Vietnamese)

[https://www.isbe.net/Documents/consent\\_forms\\_instruct.pdf](https://www.isbe.net/Documents/consent_forms_instruct.pdf)

## ISBE IEP Forms

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Select the link below to view the **IEP Forms (English)** provided by the *Illinois State Board of Education*.

<https://www.isbe.net/Documents/34-54-iep-forms.pdf>

Select the link below to view the **IEP Forms (Spanish)** provided by the *Illinois State Board of Education*.

<https://www.isbe.net/Documents/34-54-iep-forms-sp.pdf>

## ISBE IEP Instructions

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Select the link below to view the **IEP Instructions** provided by the *Illinois State Board of Education*.

[http://www.isbe.net/Documents/iep\\_instructions.pdf](http://www.isbe.net/Documents/iep_instructions.pdf)