

Special Education Documentation Grid¹

Meetings, Documentation & Team Membership

MEETING	TIMELINE	PAPERWORK	TEAM	COPIES TO:
Annual IEP meeting	Once every 365 days	<ul style="list-style-type: none"> Meeting Notice Meeting Notes Oregon Standard IEP Transition age IEP for students 16 and older² Procedural Safeguards Prior Notice of Special Ed Action 	<ul style="list-style-type: none"> Parent (and student if appropriate) At least 1 SpEd teacher or provider* Regular ed teacher(s)* District rep* Individual who can interpret instructional implications of eval results*³ Others as appropriate <p>Transition age:</p> <ul style="list-style-type: none"> With parent or adult student consent, invite agency rep if the agency is likely to pay for transition services. 	<p><u>Within 10 days:</u></p> <ul style="list-style-type: none"> Parent All current teachers of the student SpEd case mngr Other specialist(s) providing special ed services to student Student file <p>NOTE: For transition-age students who are 18 years and older, copies must also be provided (adult student).</p>
Placement Determination	Once every 365 days <i>May be conducted immediately after the annual IEP meeting</i>	<ul style="list-style-type: none"> Meeting Notice Meeting Notes Placement Form Prior Notice of Special Ed Action if change in placement 	<ul style="list-style-type: none"> Parent (and student if appropriate) Person(s) knowledgeable about the student* Person knowledgeable about placement options* Individual who can interpret evaluations* 	<p><u>Within 10 days:</u></p> <ul style="list-style-type: none"> Parent and/or adult student SpEd case mngr Student's teacher(s) Related service providers Student file
Initial Referral for Special Education	District responds promptly to request and appoints team to determine if initial evaluation needs to be conducted	<ul style="list-style-type: none"> Documentation of team members input (regardless of whether meeting held) Meeting notes if meeting conducted Prior written notice of special ed action Procedural Safeguards 	<p>Meeting optional</p> <ul style="list-style-type: none"> Parent At least 2 professionals, one of which is a specialist in the evaluation and education of children with a disability 	<ul style="list-style-type: none"> Parent and/or adult student Student file

¹ Adapted from Molalla River School District Meeting & Paperwork Organizational Grid

² MUST use for students who are 15 but who turn 16 prior to the date of the next annual IEP.

³ If required team member (*) is absent, written agreement for nonattendance or excusal must be included in paperwork and placed in student file.

MEETING	TIMELINE	PAPERWORK	TEAM	COPIES TO:
		<i>If evaluation team determines that special ed evaluation is required, referred for evaluation planning.</i>		
Evaluation Planning – Initial Eligibility	Promptly after referral by district evaluation team	<ul style="list-style-type: none"> Meeting Notes Consent for evaluation Prior written notice with test descriptors page(s) Medical and/or release of information forms as needed Medicaid consent form if appropriate 	<ul style="list-style-type: none"> Parent Regular ed teacher(s)* Special ed teacher* Other specialist(s) as appropriate* District rep* Individual who can interpret evaluations* 	<ul style="list-style-type: none"> Parent and/or adult student SpEd case mngr Specialist(s) who will conduct evaluation Student file
Evaluation Planning -Re-evaluation	<p>Not less than 60 days before eligibility due date, or upon parent or teacher request.</p> <p><i>Re-eval must occur at least every 3 years, unless the parent & district agree that it is not necessary. May occur not more than once a year, unless parent & district agree.</i></p>	<ul style="list-style-type: none"> Meeting Notes <p><i>If additional evaluation required:</i></p> <ul style="list-style-type: none"> Consent for evaluation Prior written notice with test descriptors page(s) Medical and/or release of information forms as needed Medicaid consent form if appropriate If evaluation at parent request provide copy of Procedural Safeguards 	<ul style="list-style-type: none"> Parent Regular ed teacher(s)* Special ed teacher* Other specialist(s) currently providing related services* District rep* Individual who can interpret evaluations* 	<ul style="list-style-type: none"> Parent and/or adult student SpEd case mngr Specialist(s) who will conduct evaluation Student file
Initial Eligibility	Within 60 school days of signed consent to evaluate ⁴	<ul style="list-style-type: none"> Meeting Notice Meeting Notes Evaluation Reports Eligibility Form Prior Notice of Special Ed Action 	<ul style="list-style-type: none"> Parent Regular ed teacher(s) Special ed teacher Other specialist(s) providing related services District rep Individual who can interpret evaluations 	<p><u>Within 10 days:</u></p> <ul style="list-style-type: none"> Parent and/or adult student SpEd case mngr Related service providers Student file
Eligibility	Once every 3 years and within 60 school	<ul style="list-style-type: none"> Meeting Notice Meeting Notes 	<ul style="list-style-type: none"> Parent Regular ed teacher(s) 	<p><u>Within 10 days:</u></p> <ul style="list-style-type: none"> Parent and/or adult

⁴ Out-of-state transfer students with valid IDEA eligibility: Team may base Oregon eligibility on review of student file using Oregon criteria if the evaluation team determines that no further evaluation is required.

MEETING	TIMELINE	PAPERWORK	TEAM	COPIES TO:
	days of signed parental consent to evaluate. ⁵	<ul style="list-style-type: none"> ◦ Evaluation Reports ◦ Eligibility Form ◦ Prior Notice of Special Ed Action if change in eligibility status 	<ul style="list-style-type: none"> ◦ Special ed teacher ◦ Other specialist(s) providing related services ◦ District rep ◦ Individual who can interpret evaluations 	<ul style="list-style-type: none"> ◦ student ◦ SpEd case mngr ◦ Related service providers ◦ Student file
Initial IEP	Within 30 calendar days after initial eligibility is established	<ul style="list-style-type: none"> ◦ Meeting Notice ◦ Meeting Notes ◦ Oregon Standard IEP ◦ Transition age IEP required for all students age 16 & older⁶ ◦ Prior Notice & Consent for initial provision of special ed services 	<ul style="list-style-type: none"> ◦ Parent (and student if appropriate) ◦ Regular ed teacher(s) ◦ Special ed teacher ◦ District rep ◦ Individual who can interpret evaluations ◦ Others as appropriate 	<u>Within 10 days:</u> <ul style="list-style-type: none"> ◦ Parent and/or adult student ◦ SpEd case mngr ◦ Student's teachers ◦ Related service providers ◦ Student file
Transfer: Intradistrict	In consultation with parents, provide comparable services described in IEP.	May require IEP meeting and/or IEP revisions and review of placement options.	Variable.	<u>Within 10 days:</u> <ul style="list-style-type: none"> ◦ Parent and/or adult student ◦ SpEd case mngr ◦ Student's teachers ◦ Related service providers ◦ Student file
Transfer – from another Oregon district	In consultation with parents, provide comparable services described in previous district's IEP until current district either: <ul style="list-style-type: none"> ◦ Adopts IEP, or ◦ Develops, adopts & implements a new IEP 	<ul style="list-style-type: none"> ◦ Meeting Notice ◦ Meeting Notes ◦ Oregon Standard IEP ◦ Transition age IEP for students 16 and older ◦ Procedural Safeguards ◦ Prior Notice of Special Ed Action 	<ul style="list-style-type: none"> ◦ Parent (and student if appropriate) ◦ Regular ed teacher(s) ◦ Special ed teacher ◦ District rep ◦ Individual who can interpret evaluations ◦ Others as appropriate 	<u>Within 10 days:</u> <ul style="list-style-type: none"> ◦ Parent and/or adult student ◦ SpEd case mngr ◦ Student's teachers ◦ Related service providers ◦ Student file
Transfer – from out of state	In consultation with parents, provide comparable services described in previous district IEP until	<ul style="list-style-type: none"> ◦ Meeting Notice ◦ Meeting Notes ◦ Oregon Standard IEP ◦ Transition age IEP for students 16 and older 	<ul style="list-style-type: none"> ◦ Parent (and student if appropriate) ◦ Regular ed teacher(s) ◦ Special ed teacher ◦ District rep 	<u>Within 10 days:</u> <ul style="list-style-type: none"> ◦ Parent and/or adult student ◦ SpEd case mngr ◦ Student's teachers

⁵ Team may base eligibility on student file review for students with current Oregon eligibility if no further evaluation required.

⁶ MUST use for students who are 15 but who turn 16 prior to the date of the next annual IEP.

MEETING	TIMELINE	PAPERWORK	TEAM	COPIES TO:
	district completes Oregon eligibility <i>and</i> current district either: <ul style="list-style-type: none"> ◦ Adopts IEP; ◦ Develops, adopts & implements a new IEP; or ◦ Determines student not eligible under Oregon criteria 	<ul style="list-style-type: none"> ◦ Procedural Safeguards ◦ Prior Notice of Special Ed Action 	<ul style="list-style-type: none"> ◦ Individual who can interpret evaluations ◦ Others as appropriate 	<ul style="list-style-type: none"> ◦ Related service providers ◦ Student file
Revisions to IEP		<p><u>If no formal meeting:</u></p> <ul style="list-style-type: none"> ◦ Written Agreement form ◦ Revised Oregon IEP ◦ Prior Notice of Special Ed Action <p><u>If formal IEP meeting held:</u></p> <ul style="list-style-type: none"> ◦ Meeting Notice ◦ Meeting Notes ◦ Revised Oregon IEP ◦ Prior Notice of Special Ed Action 	<p><u>If formal meeting conducted:</u></p> <ul style="list-style-type: none"> ◦ Parent (and student if appropriate) ◦ At least 1 SpEd teacher or provider* ◦ Regular ed teacher(s)* ◦ District rep* ◦ Individual who can interpret instructional implications of eval results*⁷ ◦ Others as appropriate <p>Transition age:</p> <ul style="list-style-type: none"> ◦ With parent or adult student consent, invite agency rep if the agency is likely to pay for transition services. 	<p><u>Within 10 days:</u></p> <ul style="list-style-type: none"> ◦ Parent and/or adult student ◦ All current teachers of the student ◦ SpEd case mngr ◦ Other specialist(s) providing special ed services to student ◦ Student file

⁷ If required team member (*) is absent, written agreement for nonattendance or excusal must be included in paperwork and placed in student file.