



# Indiana IEP Walkthrough for Multidisciplinary (MD) Team Members

## IIEP MAIN PAGE

### CREATE CASELOAD

- 1) From the Main Page, select Wizards from the green menu bar at the top of the screen.
- 2) From the green menu bar, click *Wizards* and select *Wizards* from the dropdown menu.
  - a) Select *Caseload Setup Wizard*.
- 3) To add students to the caseload, click the button at the bottom of the screen labeled, *Add More Students to Caseload*.
- 4) To *Add More Students to Caseload*.
  - a) Enter search criteria.
  - b) Click *View Students* button.
  - c) Students meeting search criteria display on screen.
  - d) Check either TOR/Case Manager or Team Member for the students.
- 5) Click *Add Students to Caseload* button at the bottom **OR**
- 6) Click *Add Students to Caseload, then find more* to complete another student search and add more students.
- 7) Change the location of the check and update database to change from TOR/Case Manager to Team Member and vice versa.
- 8) Remove both checks for a student to remove them from the Caseload.
- 9) **Click *Update the Database* to confirm the change.**

### VIEW CASELOAD

- 1) Select Students from the green menu bar at the top of the screen.
- 2) Click *View My Caseload*.
- 3) TOR/Case Manager or Team Member Caseload appears.
  - a) To add or remove students from this list see - **Create Caseload above**.
- 4) Click on the header of any column to sort by that information.
  - a) By default, the list is sorted by student name with the TOR's students listed first.
  - b) Any students assigned to the user as Teacher of Service are listed next.
  - c) Click the header of the first column (*CP*) for a detailed explanation of the compliance symbols.

### GENERAL IIEP NOTE

With all pages in IIEP,

1. **SAVE** saves the information on the screen.
2. **SAVE & CONTINUE** saves the information on the screen and checks it against IIEP's Rules of Completion.
3. If any part is incomplete or missing, error messages will appear at the top of the page.
4. If all parts are complete, IIEP advances to the next page.

### ACCESS THE REFERRAL PROCESS

From the Caseload list, click a student's name or click the student's name from the Main Page widget.

## PRE-CONFERENCE PLANNING

### TYPE OF EVALUATION

- 1) From the blue menu bar, click Special Education and select *Pre-Conference Planning* from the drop-down menu.
- 2) Click *Type of Evaluation*.
- 3) Select the Purpose of meeting that best corresponds to the Referral Request.

**NOTE: More information may be required depending upon the purpose selected.**

- a) Initial (First Steps) is available based on the student's age.
    - i) Evaluation must be completed, and the case conference held so that services can be in place by the student's 3<sup>rd</sup> birthday.
  - b) Initial Evaluation (50-day timeline)
  - c) Initial following lack of progress in response to interventions.
    - i) 20 instructional days to complete all assessments and hold the case conference.
  - d) Reevaluation
    - i) Requires selection of the reason for reevaluation.
      - (1) Information is needed to reestablish eligibility for special education and related services (12-month timeline).
      - (2) Information is needed to determine that the student is eligible for special education under a different or additional eligibility category (50-day timeline).
      - (3) Information is needed to inform the student's case conference committee of the student's related service needs, such as the student's need for assistive technology or a related service (50-day timeline).
  - e) Move-in (**Initials Only**) requires enrollment date.
    - i) This purpose is useful if an evaluation had already begun in a previous district.
  - f) Initial Expedited Evaluation
    - i) 20 instructional days to complete all assessments and hold the case conference.
    - ii) This option often follows disciplinary or legal proceedings at the direction of a hearing officer.
- 4) Multiple purposes may be selected.
    - a) IIEP will not allow some combinations of purposes.
      - (a) For example, Reevaluation and Initial may not be selected.
  - 5) IIEP may prompt for additional information on this page based on the purpose.
  - 6) Click: **SAVE OR SAVE & CONTINUE.**

### EXISTING DATA

**Note: This section is not necessary for the completion of the Educational Evaluation Report.**

1. Describe strengths of the student.
2. Describe the concerns of the parent for enhancing the education of the student.
3. **For Initial Conference Following Failed Response to Intervention only** record information regarding the instructional strategies and research-based interventions in which the student participated.
4. Review Progress Monitoring Data and report student growth and progress toward annual goals.
5. Record any the academic and functional present levels for the student and how the student's disability affects his or her access to the general education curriculum.
6. Click: **SAVE OR SAVE & CONTINUE.**

### REFERRAL DECISION

- 1) Enter the Referral Date.
- 2) Select the Referral Source.

- i) Parent/Legal Guardian
- ii) School/Public Agency
- 3) Click *Finalize Referral* to finalize the referral and create a Referral Event in IIEP.
- 4) Click *Yes* in the popup window to confirm Finalization of Referral event.
  - i) Enter Factors Considered.
  - ii) Capture all relevant data to the decision to confirm or refuse the request to evaluate.
- 5) Based upon the Factors Considered, select the public agency's response to the request to conduct an educational evaluation.
  - i) Choose *Yes* to confirm the request to evaluate.
    - (1) School/Public Agency requests are automatically confirmed.
    - (2) Document the decision to conduct the evaluation.
    - (3) The process to create a Notice of Evaluation continues under **Eligibility Categories and Assessments**.
  - ii) Choose *No* to refuse a request to evaluate.
    - (1) Document the decision to refuse to evaluate.
    - (2) All Notices may be printed in Spanish or English.
      - (a) If Spanish is selected, IIEP will print two copies: One copy will print in Spanish and the other in English.
    - (3) Create Draft or Final Notice of Evaluation Refusal.
    - (4) This halts the process and creates an evaluation refusal event in IIEP.**
- 6) Click: **SAVE OR SAVE & CONTINUE.**

## ELIGIBILITY CATEGORIES AND ASSESSMENTS

- 1) Indicate the student's status as an English Language Learner.
  - a) If *Yes* is selected additional Assessment Domains become available for this Evaluation.
- 2) Indicate the Suspected Disability Categories.
  - a) Multiple Categories may be selected.
- 3) All required assessment domains are automatically selected under **Assessment Domains to be Investigated for this Evaluation**.
  - a) **For Initial Evaluations** all required assessment domains are checked and must be assessed.
    - i) Additional domains may be selected.
  - b) **For Reevaluations** the required domains are selected.
    - i) If the reevaluation purpose is to reestablish eligibility for special education and related services:
      - (1) Only the areas of eligibility from the last eligibility determination appear as options.
        - (a) All required domains are checked.
        - (b) The multidisciplinary team should check only those domains to be assessed.
    - ii) If the reevaluation purpose is set to inform the case conference committee of the students related service needs:
      - (1) There should be no adjustment to the student's eligibility for a related service assessment.
      - (2) Select only those assessment domains necessary for the related service assessment.
    - iii) If the reevaluation purpose is set to determine eligibility for a different or additional area:
      - (1) All potential eligibility areas appear as options.
      - (2) Assessment Domains are automatically selected based on the eligibility areas chosen.
      - (3) THESE SELECTED ASSESSMENT DOMAINS ARE REQUIRED FOR ELIGIBILITY**
        - (a) **Do not remove any selected assessments.**
- 4) Click: *Create Draft Notice of Reevaluation or Final Notice of Evaluation.*

5) Click: **SAVE OR SAVE & CONTINUE.**

## EVALUATION PROCESS

### CREATE MULTIDISCIPLINARY (MD) TEAM

1. From the blue menu bar, click Special Education and select *Evaluation Process* from the dropdown menu.
2. Click *Create MD Team*.
3. Current Teacher of Record/Case Manager should display the current Case Manager.
  - a) To change this, select the new Case Manager from the dropdown list.
4. Click the *Select Team* button to choose the Case Conference Committee Team.
  - a. Update Team Page.
  - b. Current TOR/Case Manager is listed.
  - c. List of Parent(s) and/or Legal Guardian(s) who will receive IEP Information appear.
  - d. Users within IIEP that may access IEP data at this school are listed.
    - (a) check users that will be a part of the CCC team.
    - (b) check the view only box to limit team member access to read only.
  - e. Once all information is accurately recorded, click **SAVE OR SAVE & CONTINUE.**
  - f. If all parts are complete, IIEP returns to Create CCC Team.
5. To add or edit the CCC team click the *Select Team* button.
6. Team members without accounts in the system or not required by rule may be added under Additional Team Members.
7. Click: **SAVE OR SAVE & CONTINUE.**

### ASSIGN MD TEAM ROLES

1. The required multidisciplinary team members are listed based upon the selected disability categories.
2. Click the dropdown box beside each listed role to assign a team member.
3. Click: **SAVE OR SAVE & CONTINUE.**

### PARENT CONSENT CONTACTS

1. Record the parent's response to the request to evaluate.
2. Record the date signed consent to evaluate was received by the School/Public Agency.
3. Identify the communication entry or entries that corresponds to the request to evaluate.
4. Click: **SAVE OR SAVE & CONTINUE.**
5. **If the parent or legal guardian refused to consent to evaluation, the process ends by clicking *Save & Continue*.**
6. **If the parent or legal guardian revokes consent to evaluate, change consent to *No* and the consent date to reflect the refusal date.**
  - a. In this case IIEP will require a communication event to be logged as documentation of the revocation. This should be added under Communications from the blue menu bar.

## EXISTING DATA

1. Describe strengths of the student.
2. Describe the concerns of the parent for enhancing the education of the student.
3. **For Initial Conference Following Failed Response to Intervention only:** Record information regarding the instructional strategies and research-based interventions in which the student participated.
4. Review Progress Monitoring Data and report student growth and progress toward annual goals.
5. Record any the academic and functional present levels for the student.
6. Click: **SAVE OR SAVE & CONTINUE.**

## ASSESSMENT DATA

- 1) Record the date the Evaluation Began.
- 2) Record License information of selected Multidisciplinary Team Members (optional).
- 3) Record the reason the student was referred for testing.
- 4) Click *Add Domain Findings and Data Tables* to select the assessment instruments and align them to assessment domains selected in the **Preconference Planning Process – Eligibility Categories and Assessments.**

## Add Assessments (No Previous Assessments Recorded in IIEP)

- 1) From the Add Assessment Page select multiple Assessment Instruments and/or multiple Custom Assessment Instruments used to evaluate this student.
  - a) **Enter Findings for this Domain (no Assessment Instruments or Data Tables)** may be selected as an Assessment Instrument if no Instruments or Data Tables are necessary.
- 2) Select the Assessment Domain Category for each selected instrument.
  - a) **At least one assessment instrument is required for each assessment domain.**
  - b) **Multiple assessment instruments may be assigned to an assessment domain.**
- 3) Select *Back* to return to the Assessment Data page without saving any changes.
- 4) Click *Save & Add More* to add more Assessment Instruments or Custom Assessment Instruments.
- 5) Select **SAVE OR SAVE & CONTINUE** to save changes and continue to the **Assessments/Evaluations List.**

## Assessments/Evaluations List

- 1) For each assessment instrument listed:
  - a) **Optional:** Enter the Assessment Date.
  - b) Select the Subtest/Composite administered.
    - i) If a Custom Assessment Instrument was previously indicated, custom Subtest/Composite values may be entered.
  - c) Select the Score Type recorded.
    - i) Custom Score Types are available if a scoring option is not listed.
  - d) If **Enter Findings for this Domain (no Assessment Instruments or Data Tables)** is the selected Assessment Instrument.
    - i) No Subtest/Composite required.
    - ii) Select No Score Type – Text Results for the Score Type.
  - e) Click **Save** in the far-right column.
  - f) **Details** button now appears in the far-right column.
    - i) The **Save** button will reappear if any changes are made to the Subtest/Composite or Score Type.
    - ii) Click **Save** to record these changes.

- g) Click **Details** to view the **Input Assessment Results and Findings** page.

### Add Assessments (Assessments previously saved in IIEP)

- 1) Assessments may be listed from previous evaluations or if the evaluation is in development.
- 2) For each assessment instrument listed:
  - a) **Optional:** Enter the Assessment Date.
  - b) Select the Subtest/Composite administered.
    - i) If a Custom Assessment Instrument was previously indicated, custom Subtest/Composite values may be entered.
  - c) Select the Score Type recorded.
    - i) Custom Score Types are available if a scoring option is not listed.
  - d) If **Enter Findings for this Domain (no Assessment Instruments or Data Tables)** is the selected Assessment Instrument.
    - i) No Subtest/Composite required.
    - ii) Select No Score Type – Text Results for the Score Type.
  - e) Click **Save** in the far-right column.  
**Details** button now appears in the far-right column.
    - i) The **Save** button will reappear if any changes are made to the Subtest/Composite or Score Type.
    - ii) Click **Save** to record these changes.
  - f) Click **Details** to view the **Input Assessment Results and Findings** page
- 3) Check box in the **Del** Column and select **Save or Save and Continue** to delete an assessment from the report.
- 4) Select Edit Details for All Assessments to enter Results and Findings for all listed Assessments.
  - a) Enter data in the fields provided.
  - b) Each data field is editable.
  - c) Additional fields appear to record new scores for the same report.
  - d) Click: **SAVE OR SAVE & CONTINUE** to save the data entered and return to the Assessment page.
- 5) Click **Add Assessment** to set up additional assessments for data collection.
- 6) From the **Add Assessment Page** select multiple Assessment Instruments and/or multiple Custom Assessment Instruments used to evaluate this student.
  - a) **Enter Findings for this Domain (no Assessment Instruments or Data Tables)** may be selected as an Assessment Instrument if no Instruments or Data Tables are necessary.
- 7) Select the Assessment Domain Category for each selected instrument.
  - a) **At least one assessment instrument is required for each assessment domain.**
  - b) **Multiple assessment instruments may be assigned to an assessment domain.**
- 8) Select **Back** to return to the Assessment Data page without saving any changes.
- 9) Click **Save & Add More** to add more Assessment Instruments or Custom Assessment Instruments.
- 10) Select **SAVE OR SAVE & CONTINUE** to save changes and continue to the **Assessments/Evaluations List**.

### Input Assessment Results and Findings

- 1) View/Edit/Update – Discussion of Evaluation Results and Findings for the selected Assessment Domain.
  - a) This text box will appear under **Details** for each Assessment Instrument aligned to the same Assessment Domain Category.
  - b) Enter the data for the Subtests/Composites selected.



- i) Each data field is editable for correction.
  - ii) Each data field may be deleted.
  - iii) Additional data fields appear for each subtest/composite to record new scores for the same report.
- c) Click: **SAVE OR SAVE & CONTINUE** to save the data entered and return to the Assessment page.
  - d) Click: **Back** to return to the Assessment page.
  - e) From the Assessments page click **SAVE OR SAVE & CONTINUE** to save the data entered and return to the Assessment Data page.
    - i) Error messages will appear at the top of the page if any Assessment Domain has not been addressed or any assessment instrument is missing data.

### Synthesized Summary

- 1) Record a synthesized summary of all assessments completed or reviewed.
- 2) **If Autism Spectrum Disorder** was selected as a potential area of eligibility:
  - a) Click **Create or Review ASD Alignment** to record findings aligned to the characteristics of Autism Spectrum Disorder.
  - b) Record specific examples for each characteristic.
  - c) Select **Yes or No** to indicate sufficient or insufficient evidence for the characteristic.
  - d) Click **SAVE OR SAVE & CONTINUE** to save the data entered and return to the Assessment Data page.
  - e) Indicate whether the ASD Alignment should print as part of the Educational Evaluation Report.
- 3) **If Specific Learning Disability** was selected as a potential area of eligibility:
  - a) Select **Create or Review SLD Certification** to record the MD Team opinion regarding the existence of a Specific Learning Disability.
  - b) Record the findings for each of the elements listed.
  - c) Record the team's opinion and areas of SLD eligibility.
  - d) Click **SAVE OR SAVE & CONTINUE** to save the data entered and return to the Assessment Data page.
  - e) Indicate whether the SLD Certification should print as part of the Educational Evaluation Report.
    - i) This report can then be signed by members of the multidisciplinary team and stored in the IIEP system using the EasyFax option.
- 4) Upload any relevant test results or reports.
- 5) Create Draft or Final Version of the Education Evaluation Report
  - a) As with all documents created, the titles and headings may appear in Spanish or English if desired.
- 6) Click: **SAVE OR SAVE & CONTINUE.**

### NOTICE OF INITIAL FINDINGS AND PROPOSED ACTIONS (INITIAL EVALUATIONS ONLY)

1. Complete each text area in response to the prompts provided.
2. Click: **SAVE OR SAVE & CONTINUE.**
3. Notice of Initial Findings and Proposed Actions prints as part of the Notice of Case Conference for Initial Case Conferences.
  - a. **The Notice of Initial Findings and Proposed Actions must be received by the parents at least 5 days prior to the scheduled case conference.**

