



# Indiana IEP Walkthrough for Teachers of Record

## 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 or from Team Member to TOR/Case Manager.
- 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.

### ACCESS THE IEP

- 1) From the Caseload list, click a student's name or click the student's name from the Main Page.
- 2) From the blue menu bar click Special Education, select *IEP Process* from the dropdown menu.

## IEP Process

### Meeting Purpose

- 1) Select the Meeting Purpose that best represents the reason for calling a Case Conference.
  - a) Some purposes may be preselected, such as Transition, according to the student's age or grade level.
  - b) Multiple purposes may be selected.
    - i) IIEP will not allow some combinations of purposes.
    - ii) For example: Annual and Initial Evaluation may not be selected together.
  - c) IIEP may prompt for additional information on this page based on the purpose (i.e., Move-In).
  - d) For the Meeting Purposes Annual, Revise IEP, and Revise IEP without a meeting, a checkbox to Reset Pre-Conference Planning, Evaluation Process, and IEP Process status at midnight appears.
    - i) This is intended to aid in the development of a new IEP.
    - ii) This option will reset the compliance check marks for each of the process pages.
      - (1) Each Page in the process must be revisited to regain the compliance check marks.
    - iii) The only page that is completely reset is the Schedule CCC Meeting page.
- 2) Click: **Save OR Save & Continue**.
  - a) **Save** saves the information on the screen.
  - b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - d) If all parts are complete, IIEP advances to the next page.

## CREATE CCC TEAM

- 1) Current Teacher of Record/Case Manager should display the current TOR.
  - a) To change this, select the new TOR from the dropdown list.
- 2) Click the *Select Team* button to add to or edit the Case Conference Committee Team
- 3) Update Team Page to include the following:
  - a) Current TOR/Case Manager.
  - b) Parent(s) who will receive IEP Information.
  - c) Users within IIEP that may access IEP data at this school.
  - d) Check users that will be a part of the CCC team.
    - i) Check the view only box to limit team member access to read only.
- 4) Once all information is accurately recorded, click: **Save OR Save & Continue**.
  - a) If all parts are complete, IIEP returns to Create CCC Team.
- 5) Click: **Save OR Save & Continue**.
  - a) **Save** saves the information on the screen.
  - b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - d) If all parts are complete, IIEP advances to the next page.

## SCHEDULE CCC MEETING

- 1) Enter proposed Date, Time and Place for the CCC Meeting.
  - a) This date populates the date fields for Annual Goals and Special Education or Related Services.
  - b) If the Meeting Purpose is Revise without a Meeting, enter the Revise IEP date. In this case there should be no requirement to generate a Notice of Case Conference.
  - c) Record Additional Details/Instructions for the meeting.
    - i) This field will print to the Notice of Case Conference if there is any text entered. If the box is empty it will not print to the document.
- 2) Record Date the Notice of Case Conference Document Sent to Parent.
- 3) Record Proposed Initiation and Annual Review Dates.
- 4) **Secondary Transition Only** Indicate whether the Transition Service Agency Representative is to be invited to the case conference.

## INVITED INDIVIDUALS

- 1) **Student**
  - a) The student may be selected from the available dropdown or may be left blank if the student is not attending the case conference.
- 2) **Public Agency Representative**
  - a) Select CCC Team Member that best fits the requirements for this role.
  - b) This individual may be excused from the CC **with prior written consent** of the parent.
  - c) If this team member must be excused select the appropriate option from the Requesting Excusal Dropdown.
    - i) Definitions of the excusal options appear below the Invited Individuals grid.
  - d) Consent for excusal prompts are included in the Notice of Case Conference if selected here.

**3) Parent**

- a) Any individual designated as a Legal Guardian in the **Parent Info** section may be selected here.

**4) Current TOR/Case Manager**

- a) This information should be the same as the selection made on the Select CCC Team page.
- b) This individual may be excused from the CC **with prior written consent** of the parent.
- c) If this team member must be excused select the appropriate option from the Requesting Excusal Dropdown.
  - i) Definitions of the excusal options appear below the *Invited Individuals* grid.
- d) Consents for excusal prompts are included in the Notice of Case Conference if selected here.
- e) Record Parent response to excusal request in the Consent to Excuse column.

**5) General Education Teacher**

- a) This individual does not typically have an account in IIEP.
  - i) The General Education Teacher's name may be entered in the text area provided.
- b) This individual may be excused from the CC **with prior written consent** of the parent.
- c) If this team member must be excused select the appropriate option from the Requesting Excusal Dropdown.
  - i) Definitions of the excusal options appear below the *Invited Individuals* grid.
- d) Consents for excusal prompts are included in the Notice of Case Conference if selected here.
- e) Record Parent response to excusal request in the *Consent to Excuse* column.

**6) Secondary Transition Only – Transition Service Agency Representative if invitation was previously indicated in step 4 of the Schedule CCC Meeting process.**

- a) This individual does not typically have an account in IIEP.
  - i) The Representative's name may be entered in the text area provided.
- b) This individual may be **invited** to the CC **with prior written consent** of the parent.
- c) Consents for invitation prompts are included in the Notice of Case Conference if selected here.
  - i) Record Parent response to consent to invite request in the *Consent to Invite* column.

**7) Create Draft Notice of Case Conference.**

- a) This step is not required but is beneficial in eliminating mistakes in dates, times, participants, and location.

**8) Create Final Notice of Case Conference.**

**9) Select Parent Communication**

- a) Select from the Parent Communications listed the event that records the delivery of the Notice of Case Conference.

**10) Click: **Save OR Save & Continue.****

- a) **Save** saves the information on the screen.
- b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
- c) If any part is incomplete or missing, error messages will appear at the top of the page.
- d) If all parts are complete, IIEP advances to the next page.

## EXISTING DATA

### 1) Notice of Procedural Safeguards (If Meeting Purpose is Annual or any Initial)

- a) Record the date the Notice of Procedural Safeguards were provided to the parent or guardian.
- b) The date should be on or before the conference meeting date.

### 2) Evaluation Information and Student Data

- a) Describe strengths of the student.
- b) Describe the concerns of the parent for enhancing the education of the student.
- c) **Initial Following Failed Response to Intervention Only**
  - i) Record information regarding the instructional strategies and research-based interventions in which the student participated.
  - ii) This field appears only if the purpose of the case conference is indicated as Initial Following Failed Response to Intervention.
- d) Review Progress Monitoring Data and record results.
  - i) This data may help the CCC to determine the need for additional testing.
  - ii) This field may be used to describe the growth or progress this student has made related to his or her annual goals.
- e) Provide a statement of the student's Present Levels of Academic Achievement and Functional Performance.
  - i) Include how the student's disability or suspected disability affects involvement and progress in the General Education Curriculum.
  - ii) Each contributor to the IEP document may enter a separate statement.
  - iii) The Teacher of Record has the option to delete outdated entries.

3) Record relevant eligibility discussion details in Conference Notes.

### 4) Click: **Save OR Save & Continue.**

- a) Save saves the information on the screen.
- b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
- c) If any part is incomplete or missing, error messages will appear at the top of the page.
- d) If all parts are complete, IIEP advances to the next page.

## ELIGIBILITY INFORMATION

**Note: This page should only be accessed during the scheduled case conference. Eligibility determinations should only be made at a case conference by the committee after a review of existing data.**

- 1) If the student's eligibility is not yet determined.
  - a) Select *To Be Determined* from the eligibility choices.
  - b) In this case only the Eligibility Information Page may be saved with no event created.
  - c) Typically, this option is used during the development of an Initial IEP or after a Reevaluation.
- 2) If the student is eligible:
  - a) Select Yes from the eligibility choices.
  - b) Record reasons for the eligibility decision.
  - c) Click *Create Eligibility* button.
  - d) From the new Eligibility Selection screen, select the primary and if needed any additional secondary eligibility areas for the student.
  - e) Enter the Eligibility Date.
    - i) The current Eligibility Date will display.
  - f) Click the **Create Eligibility Event & Continue** to confirm the eligibility choices and return to the Eligibility Information page.
  - g) The Eligibility Information page is now locked and will remain locked until a Final IEP is created.**
- 3) If the student is not eligible for services:
  - a) Select No.
  - b) Go to the Create IEP page to record attendees of the meeting.
  - c) Create a final notice of ineligibility.
    - i) The Notice of Ineligibility includes the content of the Existing Data page, Conference Notes, and a list of attendees as well as an explanation of the event.
  - d) There is no need to continue with the remainder of the IEP documentation once the final notice of ineligibility is created.
- 4) Record relevant eligibility discussion details in Conference Notes.
- 5) Click: **Save OR Save & Continue**.
  - a) Save saves the information on the screen.
  - b) Save & Continue saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - d) If all parts are complete, IIEP advances to the next page.

## SPECIAL CONSIDERATIONS AND BEHAVIOR CONCERNS

- 1) Complete Special Considerations for Limited English Proficiency – select either Yes **OR** No.
  - a) Limited English Proficiency needs must be addressed for each student; there may be additional questions here based upon the eligibility areas of the student.
  - b) If Yes is selected - Describe the language needs related to Limited English Proficiency as comprehensively as possible.
  - c) Participation in the Limited English Proficiency assessments will be recorded in the State Assessments and Other Participations page.
- 2) Complete Special considerations regarding instruction in Braille and the use of Braille – select either Yes **OR** No.
  - a) This option only appears if Blind Low Vision or Deaf-Blind are selected as eligibility areas for the student.
  - b) If Yes is selected, choose the Braille literary and math code accommodation types from the dropdown menu.
    - i) Record the considerations as well as justification for the selection.

## Manifestation Determination

- 1) Manifestation Determination only appears if Manifestation Determination is a meeting purpose.
- 2) Record the Date of Incident.
- 3) Describe the alleged misconduct and the action taken as a result of the misconduct.
- 4) Was the conduct in question caused by, or had a direct and substantial relationship to the student's disability?
  - a) If YES, **“The conduct in question was caused by, or had a direct and substantial relationship to the student's disability.”**
  - b) If NO, **“The conduct in question was not caused by, or directly and substantially related to the student's disability.”**
- 5) Was the conduct in question the direct result of the public agency's failure to implement the student's individualized education program?
  - a) If YES, **“The conduct in question has been determined to be the direct result of the public agency's failure to implement the student’s individualized education program.”**
  - b) If NO, - **“The conduct in question was not the direct result of the public agency's failure to implement the student's individualized education program.”**
- 6) If there was a failure to implement the student’s IEP, then describe the deficiencies and steps needed to remedy the deficiencies.
- 7) Share any additional findings regarding the manifestation determination.
- 8) Determine whether an FBA or BIP is indicated at this time.

## Behavioral Concerns

- 1) There is a behavior of concern for the Case Conference Committee to discuss.
  - a) If NO, this section is complete.
  - b) If YES, Provide a description of the behavior of concern.
    - i) Does the pattern of student behavior impede his or her learning or that of others?
      - (1) If Yes, describe how the behavior impedes his or her learning or that of other and the impact of the behavior.
      - (2) If No:
        - (a) Document the reasons for determining the behaviors of concern are not impeding the student's learning or that of others.
        - (b) A No response may also be selected to indicate behavior plan will be discontinued.
        - (c) The Behavior Intervention Plan was discontinued based upon the data and team discussion.
  - c) **Click Save**

## CCC Determination

- 1) Select A Functional Behavior Assessment (FBA) is not recommended at this time. Supports will be implemented as indicated.
  - a) Select at least one support to be implemented:
    - i) Environmental Supports
      - (1) Describe the supports to be implemented.
    - ii) Accommodations
      - (1) Describe the accommodations to be provided.
    - iii) Specially Designed Instruction
      - (1) A prompt to indicate which goal is aligned with student's behavioral needs will be added to the goals page.
- 2) A Functional Behavior Assessment is recommended: **The FBA will include new data.**
  - a) Provide the CCC's rationale used to recommend a functional behavior assessment.
  - b) List or describe the new student data to be collected to reevaluate this student.
  - c) Select at least one support to be implemented while student data is reviewed or collected:
    - i) Environmental Supports
      - (1) Describe the supports to be implemented.
    - ii) Accommodations
      - (1) Describe the accommodations to be provided.
    - iii) Specially Designed Instruction
      - (1) A prompt to indicate which goal is aligned with this student's behavioral needs will be added to the goals page.
- 3) A Functional Behavior Assessment (FBA) is recommended: **The FBA will be solely based on the review of existing data.**
  - a) Record the date to reconvene the Case Conference following the completion of the FBA.
  - b) Provide the CCC's rationale used to recommend a functional behavior assessment.
    - i) List or describe the existing data to be reviewed to reevaluate this student.
  - c) Select at least one support to be implemented while student data is reviewed or collected:



- i) Environmental Supports
    - (1) Describe the supports to be implemented.
  - ii) Accommodations
    - (1) Describe the accommodations to be provided.
  - iii) Specially Designed Instruction
    - (1) A prompt to indicate which goal is aligned with this student's behavioral needs will be added to the goals page.
- 4) A Functional Behavior Assessment (FBA) has been completed.
    - a) Continue to Behavior Intervention Plan Development, CCC Analysis of FBA Data, and Develop Behavior Intervention Plan.
  - 5) A review of the Existing Functional Behavior Assessment (FBA) is needed.
    - a) Continue to Behavior Intervention Plan Development, CCC Analysis of FBA Data, and Develop Behavior Intervention Plan.

### **Behavior Intervention Plan Development**

- 1) Functional Behavior Assessment was completed using the IIEP System.
  - a) Functional Behavior Assessment data is displayed.
- 2) Functional Behavior Assessment was completed without the IIEP System.
  - a) Choose File to upload.
  - b) Rename File if needed and Save.

### **CCC Analysis of Functional Behavior Assessment (FBA) Data**

- 1) Record the Case Conference Committee's discussion and review of Interfering Behavior(s) identified in the Functional Behavior Assessment.
- 2) Record the Case Conference Committee's discussion and review of Precipitating Factors identified in the Functional Behavior Assessment.
- 3) Record the Case Conference Committee's discussion and review of Setting Events identified in the Functional Behavior Assessment.
- 4) Record the Case Conference Committee's discussion and review of Antecedents identified in the Functional Behavior Assessment.
- 5) Record the Case Conference Committee's discussion and review of Maintaining Consequences identified in the Functional Behavior Assessment.
- 6) Record the Case Conference Committee's discussion and review of Related Deficits identified in the Functional Behavior Assessment.

### **Functional Behavior Assessment Summary & Hypothesis**

- 1) Briefly summarize the FBA.
- 2) Determine the hypotheses for the function of the student's behavior.

### **Develop Behavior Intervention Plan**

- 1) Hypothesis of the function of the behavior.
  - a) Record the hypothesis of the function of the student's behavior.
- 2) Proactive Strategies
  - a) Replacement behaviors and skills to be taught and learned.
- 3) Record Instructional Strategies.

- 4) Record Antecedent Strategies.
- 5) Record Positive Consequence Strategies.
- 6) Record Negative Consequence Strategies.
- 7) Record Behavioral Goals/Skills to be taught and learned.
- 8) Record Available local and state resources.
- 9) Indicate BIP review by CCC and decision to implement as written or to implement with revisions.

10) Record relevant discussion details in Conference Notes.

11) Click: **Save OR Save & Continue.**

- a) **Save** saves the information on the screen.
- b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
- c) If any part is incomplete or missing, error messages will appear at the top of the page.
- d) If all parts are complete, IIEP advances to the next page.

## TRANSITION

- 1) Transition Assessments
  - a) All previous/current transition assessments will be listed on this page.
  - b) Click *Add Assessment* to record the name of a new transition assessment.
  - c) To delete a transition assessment.
    - i) Check the box preceding the transition assessment in the *Del* column.
    - ii) Click the *Save* button.
  - d) To reorder the list of transition assessments.
    - i) Enter the new order in the box provided in the *New Pos* column.
    - ii) Click the *Save* button.
- 2) Discuss findings of any age-appropriate transition assessments.
- 3) Decide if the student has sufficient skills to live independently - select either Yes **OR** No.
  - a) If Yes, record the evidence that the student has skills to live independently.
    - i) Be sure to address independent living skills in the transition assessment summary.
  - b) If No, continue to step 4.
- 4) Enter Post-Secondary Goals regarding Independent Living, Employment, and Education and Training after high school.
- 5) Transition Service – Click ADD TRANSITION SERVICE.
  - a) Click Apply under Carryover IEP Dates to use the IEP Proposed Initiation and Annual Review Dates as Initial and Target dates for the annual goal.
  - b) Enter Description, Frequency, Postsecondary Goal to Support, by whom, and anticipated Date of Completion.
  - c) Enter Narrative detail.
  - d) Save the entry and add as many services as are required.
- 6) The transition goals updated annual either.
  - a) Yes- postsecondary goals were reviewed and discussed and remain the same. **OR**
  - b) Yes – postsecondary goals were reviewed and discussed and have been updated accordingly.

- 7) Record relevant transition discussion details in Conference Notes.
- 8) Click: **Save OR Save & Continue.**
  - a) Save saves the information on the screen.
  - b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - d) If all parts are complete, IIEP advances to the next page.

### Accommodations

- 1) Enter the anticipated date of the student's exit from high school or from extended secondary services.
- 2) Click Add Accommodations to view a list of accommodations.
  - a) Select accommodations based on the needs of this student established in the discussion of present levels of academic achievement and functional performance.
  - b) **Click: Save OR Save & Continue.**
- 3) The selected accommodations appear.
  - a) Check the box in the Delete column beside any accommodation and Click Save to remove it from the list.
- 4) Describe any accommodations not listed and/or guidance for implementation of accommodations in the box provided.
- 5) Select the student's state testing participation level.
  - a) If State Assessment participation is selected, choose whether the student will participate with or without accommodations for the current and next grade level.
  - b) If Alternate Assessment is selected, respond to the criteria statements for participation in the alternate assessment.
    - i) The answer to all prompts must be "Yes" for the student to be eligible for the alternate assessment.
    - ii) If the student meets the criteria, choose whether the student will participate with or without accommodations for the current and next grade level.
- 6) Click Review Assessment Accommodations to view the list of accommodations available for this student for each assessment based upon the Accommodations selected.
  - a) This List shows assessment accommodations allowed based upon Accommodations selected.
    - i) These assessment accommodations are provided by the Department of Education, Office of Student Assessment.
  - b) Assessment Accommodations may be unchecked here if the student does not require them for participation in the selected state assessment.
  - c) There "Universal" and "Designated" features are available here that a student may need for the state assessment such as an online glossary or streamline version of the test. Select those items as needed.
  - d) Review the list of accommodations adding test settings as needed.
  - e) If any accommodations are not listed for the state assessment the Accommodations may have to be adjusted for them to be available here.
  - f) **Click: Save OR Save & Continue**

- 7) Both the Accommodations and Assessment Accommodations will appear on the final IEP.
- 8) Complete the Rationale section and describe the reasoning for state assessment selections.
- 9) Other Participation: Articulate a plan for the student's participation in any other testing that may take place at school Include accommodations and any other direction

### IREAD3

- 1) If the student is currently in third grade options to document participation in IREAD3 appear.
  - a) Document the student's results in the IREAD3 assessment.
  - b) Record if the student passed IREAD3 record the event here.
  - c) If the student did not pass.
    - i) Retention, remediation and retake results may be recorded here.

### GRADUATION PATHWAYS

- 1) Select the option that best describes the student's chosen graduation pathway.
  - a) This option appears for students entering high school or enrolled in high school.
- 2) Record relevant accommodation discussion details in Conference Notes.
- 3) Click: **Save OR Save & Continue**.
  - a) Save saves the information on the screen.
- 4) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - a) If any part is incomplete or missing, error messages will appear at the top of the page.
  - b) If all parts are complete, IIEP advances to the next page.

### GOALS

- 1) All current goals are listed on this page.
- 2) To delete a goal.
  - a) Check the box preceding the goal in the *Del* column.
  - b) Click the *Save* button.
- 3) To reorder the list of goals.
  - a) Enter the new order in the box provided in the *Position* column.
  - b) Click the *Save* button.
- 4) To update or change a goal.
  - a) Click the *Details* button associated with that goal.

### ADD GOAL (NEW)

- 1) Add new goal.
  - a) Enter the Title for the new annual goal Click *Add Goal* and on the Goals page.
  - b) The Goal Details Page opens with the Goal Title completed.

### GOAL DETAILS

- 1) This page contains the information from the Add Goal page or from previous IEP goals.
  - a) For **New Goals** - All information may be entered to reflect a student's current needs.
  - b) For **Existing Goals** – selected fields may be updated to reflect current information.
    - i) **Copy Goals** – This option creates a complete, editable copy of the current Annual Goal.  
The new copy appears on the Goals page at the bottom of the current goal list.
- 2) **Present Levels** - Capture Present Levels of Academic Achievement and Functional Performance data that is relevant to the annual goal.

- 3) **Standards** – Click *ADD STANDARD*.
  - a) Standards – Click the + symbol next the selected standards group.
    - (1) Click the checkbox beside the desired standard and Click *Save* to record the selection.
  - b) Standards – Selected standards appear at the bottom of the Add Standards screen
    - (1) To remove a standard:
      - (a) Place a check in the *Delete* box beside the standard.
      - (b) Click *Save* to remove the standard.
- 4) **Specially Designed Instruction**- Describe the specially designed instruction needed to address the student’s educational needs based upon the data reported and collected in the Present levels.
- 5) **Annual Goal** - Compose a measurable Annual Goal that addresses one or more of the student’s educational needs.
- 6) **Method/Instrument for Measuring Progress** - Record the Method or Instrument used to measure student progress.
  - i) This method or instrument should be the same tool used to establish the student’s PLAAFP data.
- 7) **Progress Monitoring** – Select the progress monitoring method that best fits the method or instrument used to monitor student progress on this annual goal.

### Goals – Progress Monitoring Design

#### DESCRIPTIVE DOCUMENTATION

- 1) Objectives are **optional** for Descriptive Documentation.
  - a) Click *ADD OBJECTIVES OR BENCHMARKS* to add a new item.
  - b) Enter the text of the new Objective and click *Save and Continue*.
  - c) Repeat this process until all objectives/benchmarks are addressed.
- 2) Click *EDIT PROGRESS MONITORING*.
  - a) Click *Apply* under Carryover IEP Dates to use the IEP Proposed Initiation and Annual Review Dates as Initial and Target dates for the annual goal.
  - b) Under Progress Monitoring Assessment record the tool or instrument to be used.
  - c) Under Subject Area record the subject area addressed by the annual goal.
- 3) Click *ADD ASSESSMENT* to save this information.
  - a) Enter Parameters to build the graph.
  - b) Initial Value and Date: Enter the score representing the student’s initial skill level and the date it was recorded.
  - c) Target Value and Date: Enter the target score and the date by which the student should achieve this.
- 4) Click *Save & Continue* to save the data and return to the Goal Details page.

## Goals – Progress Monitoring Design

### SINGLE POINT

- 1) Click *EDIT PROGRESS MONITORING*
  - a) Click *Apply* under Carryover IEP Dates to use the IEP Proposed Initiation and Annual Review Dates as Initial and Target dates for the annual goal.
  - b) Under Subject Area record the subject area addressed by the annual goal.
  - c) Under Metric enter the task, behavior, or score being recorded.
- 2) Click *ADD ASSESSMENT* to save this information.
  - a) Enter Parameters to build the graph.
  - b) Initial Value and Date: Enter the score representing the student's initial skill level and the date it was recorded.
  - c) Target Value and Date: Enter the target score and the date by which the student should achieve this goal.
  - d) Frequency of Collection: Record the frequency of data collection.
- 3) Click *Save & Continue* to save the data and return to the Goal Details page.

## Goals – Progress Monitoring Design

### SINGLE RUBRIC

- 1) Click *EDIT PROGRESS MONITORING*.
- 2) Click *Apply* under Carryover IEP Dates to use the IEP Proposed Initiation and Annual Review Dates as Initial and Target dates for the annual goal.
- 3) Under Subject Area record the subject area addressed by the annual goal.
- 4) Click *ADD ASSESSMENT* to save this information.
  - a) Create a rubric by entering the rubric criteria in the provided form or *Add Rubric(s) from Bank* Enter Parameter to build the graph.
  - b) Initial Value and Date: Enter the score representing the student's initial skill level and the date it was recorded.
  - c) Target Value and Date: Enter the target score and the date by which the student should achieve this goal.
  - d) Record the frequency of data collection.
- 5) Click *Save & Continue* to save the data and return to the Goal Details page.

### Access the Rubric Bank for Single Rubric and Collection of Indicators

- 1) Add Rubrics from User's Bank for *Student Name* page contains:
  - a) a dropdown list of user created rubric categories.
  - b) a list of uncategorized rubrics (if any).
  - c) *Click Manage Rubrics in Bank* button.
  - d) *Click Back* to return to Goals without saving.
  - e) *Click Save* to save data.
  - f) *Click Save & Continue* to save data and return to Goals.
- 2) To add rubrics already stored in the rubric bank:
  - a) Choose the category, if any.
  - b) Click the appropriate box in the *Add* column.
  - c) Click *Save & Continue* to add the rubric and return to the Progress Monitoring screen.
  - d) The rubric should be listed along with the rest of the parameters.
- 3) Click *Manage Rubrics in Bank* to add a new rubric.

- 4) Enter the Rubric Title.
- 5) Complete at least three rubric criteria entries.
  - a) Click *Back to Student Name* to return to the Goal Details page without saving information.
  - b) Click *Save* at the bottom of the screen to save the rubric.
  - c) Click *Save & Continue* to save the rubric and return to the student's Goal Details page.
- 6) Click *Edit Categories for My Rubric Bank* to create organizational categories to sort rubrics.
  - a) Enter a title for a rubric category.
    - i) Click *Back* to return to the Manage Rubric Bank screen.
    - ii) Click *Save* to save the information.
    - iii) Click *Save & Continue* to save the information and return to the Manage Rubric Bank screen.
  - b) Rubric Categories may also be reordered or deleted from this screen.
    - i) Enter the number of the new position in *New Pos* column and click *Save* to make the change.
    - ii) To delete a rubric category, click the box in the *Del* column and click *Save* to make the change.
- 7) Click *Import Rubrics to my Rubric Bank from my Caseload* to add previously created rubrics to the rubric bank.
  - a) Choose to import Rubrics from the current student only or from an entire caseload.
  - b) Click *Save & Continue* to import rubrics and return to the Manage Users Rubric Bank screen.
  - c) Imported rubrics should appear in a list at the top of the screen.

## Goals – Progress Monitoring Design

### COLLECTION OF INDICATORS

- 1) Objectives/Benchmarks are **required** for Collection of Indicators.
  - a) Click *ADD OBJECTIVES/BENCHMARKS* to add a new item.
  - b) Enter the text of the new Objective/Benchmark and click *Save and Continue*.
  - c) Repeat this process until all objectives/benchmarks are addressed.
- 2) **Record objectives before Editing Progress Monitoring.**
  - a) Click *EDIT PROGRESS MONITORING*.
  - b) Click *Apply* under Carryover IEP Dates to use the IEP Proposed Initiation and Annual Review Dates as Initial and Target dates for the annual goal.
  - c) Under Subject Area record the subject area addressed by the annual goal.
  - d) Under Metric enter the task, behavior, or score being recorded.
- 3) **Click *ADD ASSESSMENT* to save this information.**
  - a) Enter Parameters to Build Graph for Annual Progress.
  - b) Enter Initial and Target Percentage.
  - c) Enter Initial and Target Date: The Initial and Target Date may not be outside of the IEP Effective dates.
    - i) The Date Range may be less than the effective dates.
  - d) Create a rubric by entering the rubric criteria in the provided form or:
    - i) *Add Rubric(s) from Bank.*
    - ii) *See Add Rubrics from Bank under Single Rubric description.*
- 4) **Click *Save & Continue* to save the data and return to the Goal Details page.**



5) Once the Goal Details page is complete. Click Save & Continue to return to the Goals page.

## Goals

- 1) Record relevant discussion details in Conference Notes.
- 2) Click: **Save OR Save & Continue.**
  - a) Save saves the information on the screen.
  - b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - d) If all parts are complete, IIEP advances to the next page.

## PROVISIONS

- 1) **Record/Document any and all Adult Services information shared with the student and his/her parents.**
  - a) Click *SAVE* and add as many services as are required.
- 2) **Special Education Service - Click *ADD SPECIAL EDUCATION SERVICE*.**
  - a) Select Indirect Support, Direct Services, or Speech and/or Language Services.
  - b) Click *Save & Continue* to continue adding the service.
  - c) Enter Initiation, Frequency, Length, Duration, To Support (if Transition), Location, and Narrative.
- 3) **Related Services - Click *ADD RELATED SERVICES***
  - a) Select Related Service Description.
  - b) Click *Save & Continue* to continue adding the service.
  - c) Enter Initiation, Frequency, Length, Duration, To Support (if Transition), Location, and Narrative.
  - d) Click *Save* and add as many services as are required.
- 4) **Transportation**
  - a) Answer Yes **OR** No to the transportation question.
    - i) If transit time or transportation needs of the student are different than non-disabled peers, record the transportation needs of the student and enter a related service if necessary.
    - ii) If Transportation is recorded as a related service, the medical reason for special transportation may be recorded. Select *Other* for to report any reason not listed in the dropdown menu.
- 5) **Accessible Materials**
  - a) Answer Yes **OR** No to the question.
    - i) If the student needs instructional materials provided in accessible format, describe the environments, tasks, tools, and services related to the provision of accessible instructional materials to this student.
- 6) **Assistive Technology**
  - a) Answer Yes **OR** No to the question.
  - b) If the student needs assistive technology, describe the assistive technology required.



## 7) Extended School Year (ESY)

- a) Select the appropriate choice for ESY.
  - i) ESY is indicated if one of the first three choices is selected; If ESY is unnecessary select *NONE*.
  - ii) If ESY is indicated, please enter a special education and/or related service to support this choice.

**b) Record the CCC's discussion regarding extended school year services.**

## 8) Aids/Supports

- a) Answer Yes **OR** No to the question.
  - i) If Yes, record the plan to provide school personnel with the knowledge required to implement the student's IEP.
- b) Answer Yes **OR** No to the second question.
  - i) If Yes, record modifications necessary for this student to participate in the described activities.

## 9) Progress Report Timeline

- a) Enter the frequency progress will be reported for this student.

## 10) Rationale

- a) Describe the rationale for providing these services and supports, as well as describing reasons for rejecting other options.

11) Record relevant discussion details in Conference Notes.

12) Click: **Save OR Save & Continue.**

- a) Save saves the information on the screen.
- b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
- c) If any part is incomplete or missing, error messages will appear at the top of the page.
- d) If all parts are complete, IIEP advances to the next page.

## LRE PLACEMENT

### 1) Course of Study (Post-Secondary Transition Only)

- a) Choose the diploma or diploma designation the student is pursuing.
  - i) Certificate of Completion
  - ii) General Diploma: General Designation
  - iii) General Diploma: Core 40 Designation
  - iv) General Diploma: Core 40 with Academic Honors Designation
  - v) General Diploma: Core 40 with Technical Honors Designation
- b) **If the student is entering high school or older**, document the discussion at the case conference regarding the student's progress toward the selected diploma.

### 2) Education Setting

#### a) For Early Childhood students

##### i) LRE Placement Codes:

- (1) Select the code that corresponds to the student's placement.

#### b) For K-12 students

- i) The standard instructional minutes per week for the school will appear.

- (1) This value may be adjusted here to suit the student's needs.
- ii) The system then subtracts the Total Minutes in the Special Education Setting per week.
  - (1) This value is derived from the services entered in the Provisions page that occur in the Special Education Setting.
- iii) The system then presents the number of minutes in the General Education Setting.
- iv) This value is used to calculate the percentage of time in the General Education Setting and suggest the LRE for the student.
- v) **LRE Placement Codes**
  - (1) Select the code that corresponds to the student's placement.
- c) ED Students only**
  - i) Full Time
    - (1) Student receives special education support 50% or more of the school day.
  - ii) All Other
    - (1) Student receives special education support less than 50% of the school day.
- 3) General Education Service Minutes**
  - a) Additional Descriptors of the Least Restrictive Environment**
    - i) List any additional descriptors of LRE
  - b) Potential Harmful Effects**
    - i) Summarize the discussion of potential harmful effects of the placement on the student or quality of services.
  - c) Reasons for Placement Decisions**
    - i) Describe the reason for the placement decision and other options that were considered.
- 4) General Considerations**
  - a) Consider each of the five statements carefully, If No is selected: please state the exceptions and describe the reasoning for these exceptions.
- 5) Program Information**
  - a) Legal Settlement**
    - i) The Corporation of Legal Settlement (COLS) reported to Indiana IEP appears here
      - (1) If the COLS is different than reported, select the correct school district of residence.
  - b) Access and Reporting**
    - i) These fields display the school and district providing services to the student.
- 6) Educating School or Program**
  - a) School or Program Name and School or Program Code are the current school where the student is enrolled and attending.
  - b) Select the appropriate Facility Type.
    - i) For most students, 99 Not Applicable, state assigned school number provided, should be selected.
    - ii) For facility type 01 Community-based Preschool, enter the name and state code of the preschool program.
    - iii) For all other cases, select the facility code that corresponds to the student's educating school or program.
    - iv) Describe any other program information.
      - (1) This optional field provides space to further describe the student's educating program or school if needed.

## 7) Next Projected Educating School or Program

- a) Include Notes or other information pertaining to the next school or program to provide services to this student.

## 8) Record relevant placement discussion details in Conference Notes.

## 9) Click: **Save OR Save & Continue.**

- a) Save saves the information on the screen.
- b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
- c) If any part is incomplete or missing, error messages will appear at the top of the page.
- d) If all parts are complete, IIEP advances to the next page.

## SUMMARY OF PERFORMANCE

- 1) If Exit from Secondary Education is selected as the purpose of the IEP, this page will display the information from the current workspace for each section of the service plan.
  - a) This page is not required unless the meeting purpose is Exit from Secondary Education.
  - b) To change any information displayed revisit the original page.
- 2) Complete the *What works for me* section based on student input.
  - a) Describe the accommodations, modifications, and/or assistive technology that have been most useful to the student.
  - b) Describe what will help the student be successful after graduation.
- 3) Create Final Summary of Performance.
  - a) This will include the most recent Education Evaluation Report if one exists within IIEP.
  - b) Uploaded reports must be printed separately and attached to the summary of performance.
- 4) Update Contact information if needed.
- 5) SOP may be printed separately.
- 6) Create Final Indicator 14 Letter and provide to student.
- 5) Record relevant discussion details in Conference Notes.
- 6) Click: **Save OR Save & Continue.**
  - a) Save saves the information on the screen.
  - b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - a) If all parts are complete, IIEP advances to the next page.

## REVIEW CONFERENCE NOTES

- 1) Review Conference notes for content and accuracy.
- 2) Record relevant eligibility discussion details in Conference Notes.
- 3) Click: **Save OR Save & Continue.**
  - a. Save saves the information on the screen.
  - b. **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c. If any part is incomplete or missing, error messages will appear at the top of the page.

d. If all parts are complete, IIEP advances to the next page.

### CREATE FINAL IEP

- 1) CCC meeting date and IEP Dates are reported.
  - a) To change the IEP dates, return to the **Schedule CCC Meeting** page and make the appropriate adjustments.
- 2) Mark whether the parent(s) reject the provision of FAPE.
  - a) If FAPE is rejected, the process continues with the creation of the Service Plan.
  - b) This page should be completed, and the parent's rejection of the IEP recorded under the Response button of this IEP before the committee moves on to the Service Plan.
- 3) Based upon the data reported and discussion during the development of the IEP, determine whether there is a need for reevaluation.
  - a) Select the option that best represents the needs of the student regarding reevaluation.
  - b) Document the CCC discussion regarding reevaluation.**
- 4) Continuation of CCC Meeting
  - a) These fields are optional and only to be used when there is a reason to reconvene the same CCC Meeting later.
  - b) Record the date the Case Conference Committee convened.
    - i) This date will complete the Annual Review Timeline and confirm that the meeting was held.
  - c) Record the Projected CCC Meeting Date.
    - i) This date may match the next scheduled Annual Case Review or
    - ii) The next date the Case Conference Committee plans to meet if needed to complete the development of the IEP.
- 5) CCC Meeting Attendees
  - a) Check all that attended the case conference.
  - b) Click *Add Additional Attendees* to record any other persons in attendance at the case conference.
- 6) Create Translated Version of this document.
  - a) This option only appears if the student's Home Language Survey indicates the need.
  - b) If checked the entire IEP will be translated into the student's native language.
  - c) Both the English and Translated document are produced and can be printed.
  - d) The English version is legally binding. The translated version includes notes to explain this to the reader.
- 7) If any errors exist in the IEP the button *DISPLAY ERRORS* appears.
  - a) Click the button to view a list of errors.
- 8) Click *CREATE DRAFT IEP* at any time to view a draft of the IEP containing all information entered in the IEP workspace when the draft is created.
- 9) If there are no errors and the CCC has finished deliberating:
  - a) Click *CREATE FINAL IEP*.
  - b) A parent survey link appears.
    - i) Click the link for the student's parents to complete the survey.
    - ii) Or provide parents with the link to complete the survey at a later date.
- 10) Click the *IEP* link to view and/or print the final or draft IEP.

- 11) Once the parent(s) have signed the IEP (if required) fax the signature page to the provided fax number.
- Once received a link will appear next to the IEP with a date the fax was received.
  - Click the link to view the faxed document.
- 12) Parent Receipt of Proposed IEP Document.**
- Record the date the parent was provided a copy of the final IEP.
  - Click *SAVE DATE*.
    - The system will automatically accept the IEP 10 Instructional days from this recorded date.
    - Click *REMOVE DATE* to replace the current date.
- 13) Click the Response Button to confirm acceptance of the IEP.
- 14) Record whether the IEP was:
- Accepted.
  - Accepted - 10 instructional days have passed since the IEP has been provided to the parents/guardian.
  - Rejected – parent rejects provision of FAPE and intends to unilaterally enroll child in a non-public school.
  - (For Initial IEPs only)** Rejected – Student remains in General Education
    - This option is available when parents reject the Initial IEP only. The student remains in general education and receives no special education or related services
  - Record who signed the document, the date, and any notes.
    - IEPs may be signed directly on screen by the parent.
    - IEPs may be reviewed and signed electronically using the EdPlan Parent Connect portal as well.
- 7) Record relevant discussion details in Conference Notes.
- 8) Click: **Save OR Save & Continue.**
- Save saves the information on the screen.
  - Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - If any part is incomplete or missing, error messages will appear at the top of the page.
  - If all parts are complete, IIEP advances to the next page.

## REVOCATION OF SPECIAL EDUCATION SERVICES

### 1) Discontinuation of Special Education

**Note: A student's legal guardian has the right to revoke consent for special education services.**

- Record the date the public agency received notice in writing that the student's parent or legal guardian revoked consent for special education services.
- Record the date the public agency provided the Final Notice of Discontinuation of Special Education to the student's parents or legal guardian.
- Record the date the student's special education services will be discontinued based on the legal guardian's response to the Notice of Discontinuation of Special Education.

- i) This will create an Ineligibility Event in the IEP system and the student will be designated as *General Education*. Record relevant eligibility discussion details in Conference Notes.
- 2) Click: **Save OR Save & Continue**.
- a) Save saves the information on the screen.
  - b) **Save & Continue** saves the information on the screen and checks it against IIEP's Rules of Completion.
  - c) If any part is incomplete or missing, error messages will appear at the top of the page.
  - d) If all parts are complete, IIEP advances to the next page.

### ADDITIONAL IEP PROCESS DOCUMENTS

- 1) Review the Final IEP and create any additional Final documents necessary.
- a) Additional Documents related to the IEP process are listed here.