Procedural Checklist: Transfer of a Student with a Disability From Out of State

Student Name: _____ Case Manager: _____

Timeline Goal: <u>This process should not extend beyond 3 school days</u>

✓	Tasks	Person(s) Responsible	Due Date	Actual Date
	Student enrolls and special education eligibility is determined.	Secretary	Day 1	
	Special education teacher is assigned.	Principal	Day 1	
	Enrollment sheet is faxed to the district liaison.	Secretary	Day 1	
	Records (at minimum, the most recent IEP, MET report, and report card) are requested to be faxed.	Secretary	Day 1	
	Ancillary services (speech, social work, OT, etc.), if any, are determined.	Secretary	Day 1	
	Communication between assigned special education teacher, relevant ancillary service provider(s), student, and parent is arranged.	Secretary	Day 1	
	Student, parent, relevant ancillary service provider(s) and special education teacher collaborate to: ☐ Review records and identify key compliance dates ☐ Complete the *Transfer of a Student with a Disability* form ☐ Complete the *Consent for Initial Evaluation* ☐ Complete the *REED* ☐ Develop student's schedule ☐ Discuss specific student needs[1]	Sp. Education Teacher, Ancillary Service Providers, and District Representative	Day 2	
	Student's schedule is entered into the SIS.	Secretary	Day 2	
	IEP date is scheduled and IEP invitation is created in Tienet.	Sp. Education Teacher	Day 3	
	IEP invitation is sent home/mailed and finalized.	Secretary	Day 3	
	A copy of the *Transfer, Consent, and REED* forms with signatures is sent to Jeri Rohl at VBISD.	Secretary	Day 3	
	The signature page of the Transfer is scanned and attached in Tienet.	Sp. Education Teacher	Day 3	
	MET Eligibility Recommendation form is completed and provided to, at minimum, the parent.	Ancillary Service Provider(s)	At least 5 days prior to the IEP	
	An IEP is written in Tienet and held. The purpose of the IEP is an <u>initial</u>. This will reset the 3 year reevaluation date.	Special Education Teacher	Within 30 school days of district receipt of the signed *Transfer*	

<u>Exception</u>: If the team has documentation that the student was eligible in Michigan within the past three years, and the documentation is sufficient for the student to continue to qualify under Michigan rules and regulations, you do not have to do an initial evaluation, but may follow the *Procedural Checklist: Transfer of a Student with a Disability from another District in MI*.

Notes:

[1] If a student had special transportation, contact transportation.

[2] Every effort should be made to obtain parent signature for the *Transfer*, the *Consent,* and the *REED* on the same date.

Procedural Checklist: Transfer of a Student with a Disability from another District in MI

Student Name: _____ Case Manager: _____

Timeline Goal: This process should not extend beyond 3 school days

✓	Tasks	Person(s) Responsible	Due Date	Actual Date
	Student enrolls and special education eligibility is determined.	Secretary	Day 1	
	Special education teacher is assigned.	Principal	Day 1	
	Enrollment sheet is faxed to the district liaison.	Secretary	Day 1	
	Records (at minimum, the most recent IEP, MET Report, and report card) are requested to be faxed.	Secretary	Day 1	
	Ancillary services (speech, social work, OT, etc.), if any, are determined.	Secretary	Day 1	
	Communication between assigned special education teacher, relevant ancillary service provider(s), student, and parent is arranged.	Secretary	Day 1	
	Student, parent, relevant ancillary service provider(s) and special education teacher collaborate to: ☐ Review records and identify key compliance dates ☐ Complete the *Transfer of a Student with a Disability* form[1] ☐ Consider whether a *REED* is necessary to confirm eligibility, help determine programs and services (optional) ☐ Develop student's schedule ☐ Discuss specific-student needs[2]	Sp. Education Teacher and District Representative (and Ancillary Service Providers if a *REED* is completed)	Day 2	
	Student's schedule is entered into the SIS.	Secretary	Day 2	
	IEP date (only if Option B was selected) is scheduled and IEP invitation is created in Tienet.	Sp. Education Teacher	Day 3	
	IEP invitation is sent home/mailed and finalized.	Secretary	Day 3	
	A copy of the *Transfer* form with signatures is sent to Jeri Rohl at VBISD.	Secretary	Day 3	
	The signature page of the Transfer is scanned and attached in Tienet.	Sp. Education Teacher	Day 3	
	An IEP (if Option B was selected) is written in Tienet and held. The purpose of the IEP is annual review. **OR**, if a REED was completed and eligibility was questioned, the purpose of the IEP would be a reevaluation.	Special Education Teacher	Within 30 school days of district receipt of the *Transfer*	

Notes:

1 On the *Transfer* form, select Option A to implement the current IEP. Option B will require a new IEP to be held within 30 school days.

2 If a student had special transportation, contact the transportation department.

Procedural Checklist: Initial Evaluation

Student Name: _____ Case Manager: _____

✓	Tasks	Person(s) Responsible	Date
	Request for special education evaluation is made by the parent in writing and the district documents receipt (date) of request.	School Secretary	
	Communication between the district and the parent (preferably a meeting) occurs <u>within 10 school days</u> to: ☐ Discuss current problem solving activities and progress, and ☐ Confirm the need for evaluation for a suspected disability	Special Education Team	
	Team confirms the need for evaluation and obtains signed *Consent for Initial Special Education Evaluation*.	Special Education Team	
	Team completes *REED* to document previously collected information and to determine the evaluation plan.	Special Education Team	
	Prior to the IEP, the Multidisciplinary Evaluation Team (MET) completes the following: ☐ Complete the evaluation ☐ Complete the *Eligibility Recommendation (ER)* ☐ Develop a PLAAFP on the *ER* (if eligibility is recommended) ☐ Additional documentation, if necessary, is attached in Tienet. ☐ Finalize the *ER*[1] ☐ Communicate the *ER* to the parent and other members of the IEP Team <u>3-5 days prior</u> to the IEP meeting	MET	
	The IEP meeting is scheduled, invitations are sent, and the *Invitation* is finalized in Tienet.	Case Manager	
	A draft IEP is created and the purpose is an initial IEP. If a student is found ineligible, only the *Participants and Profile* section and the *Notice* section are completed.	Special Education Service Provider(s)	
	IEP meeting is held, the IEP is completed, and Notice is provided within 7 school days.	Case Manager	
	District Liaison is notified to finalize the IEP within 7-10 school days.	Case Manager	

Notes:

[1] The ER needs to be finalized prior to creating the IEP in Tienet or else the PLAAFP will not flow correctly to the IEP.

Procedural Checklist: Termination of Special Education Eligibility

Student Name: _____ Case Manager: _____

✓	Tasks			Person(s) Responsible	Date Completed
	Develop a consensus with the student (if appropriate), parent, relevant ancillary service providers, and administration that termination of special education eligibility is in the best interest of the student.			Team	
	Team completes *REED* to document previously collected information and to determine the evaluation plan. Note: Parent input may be obtained via meeting, phone or email; however, simply sending home the form is not sufficient. The purpose of the *REED* is to "consider a change of eligibility."			Team	
	The *REED* is given to the parent for signature along with the *Special Education Parent Handbook and Procedural Safeguards*. At least 2 attempts to obtain a signature need to be documented.			Case Manager	
	Conduct a thorough *REED* to determine what, if any, additional information is needed to determine that the student is no longer a student with a disability or no longer in need of special education programs or services.			Team	
	If information is not sufficient to terminate eligibility, use the *REED* to document an evaluation plan including assessment areas and information needed.	OR	If information is sufficient, the information in the *REED* stands alone and no new information is collected.	Team	
	Fill out the *Eligibility Recommendation Form (ER)* and if information supports termination, recommend ineligibility. (Note: Although this form does not need to replicate information contained in the *REED*, there needs to be enough information in the *ER* to describe the team decision to terminate eligibility.)			Team	
	Schedule an *IEP* meeting. The purpose of the *IEP* meeting is "reevaluation," and the additional purpose is "other: consider termination of eligibility."			Case Manager	
	Conduct the *IEP*. Complete the participants and profile page and the notice page only.			Team	
	Complete the VBISD Exit form and send to your District Liaison.			Case Manager	
	Contact your District Liaison to complete the special education exit process in Tienet.			Case Manager	

Notes:

[1] The process described above is not intended for students who exit special education due to graduation or due to exceeding the age of eligibility.

[2] If a student is SLI only, a *REED* and an *ER* are required to terminate eligibility; however, if the student qualifies for another area of disability, and speech services are to be discontinued, the *REED* and an *IEP* are sufficient. If the SLP determines that new information is needed in the *REED*, a summary (not a formal report) of scores should be attached to the *REED* and this summary should also be provided on the IEP in the Participants and Profile section under "Current Evaluations."

Procedural Checklist: Reevaluation

Student Name: _____ Case Manager: _____

✓	Tasks	Person(s) Responsible	Date
	To ensure that the data on the *REED* are current and accurate, the *REED* is scheduled to be completed within 30 school days prior to the reevaluation IEP.[1]	Special Education Team	
	Team completes *REED* to document previously collected information and to determine the evaluation plan. Note: Parent input may be obtained via meeting, phone, or email; however, simply sending home the form is not sufficient.	Special Education Team	
	The *REED* is given to the parent for signature along with the *Special Education Parent Handbook and Procedural Safeguards*. At least 2 attempts to obtain a signature need to be documented.	Case Manager	
	If in the *REED* the Team determines current data are sufficient, no additional assessments are administered and the *Eligibility Recommendation (ER)* is not needed.[2] **OR** If in the *REED* the Team determines additional information is needed, an evaluation plan is documented in the *REED* and the team completes the assessments within 30 school days, before the IEP. Prior to the IEP, the Multidisciplinary Evaluation Team (MET) completes the following: ☐ Complete the evaluation. ☐ Complete the *Eligibility Recommendation (ER)*. ☐ Develop a PLAAFP on the *ER* (if eligibility is recommended). ☐ Additional documentation, if necessary, is attached in Tienet. ☐ Finalize the *ER*.[3] ☐ Communicate the *ER* to the parent and other members of the IEP Team <u>3-5 days prior</u> to the IEP meeting.	Special Education Team	
	The IEP meeting is scheduled, invitations are sent, and the *Invitation* is finalized in Tienet.	Case Manager	
	A draft IEP is created and the purpose is <u>reevaluation</u>. If a student is found ineligible, only the *Participants and Profile* section and the *Notice* section are completed.	Special Education Service Provider(s)	
	IEP meeting is held, the IEP is completed, and Notice is provided within 7 school days.	Case Manager	
	District Liaison is notified to finalize the IEP within 7-10 school days.	Case Manager	

Notes:

1 The *REED* may be extended beyond 30 school days from the reevaluation IEP if the district obtains written parent consent for a *REED* extension. A reevaluation is required every three years and there is no extension allowed for a reevaluation IEP beyond 3 years.

2 If the team would like to update scores, but a full and individual evaluation is not needed for eligibility purposes, the MET team can attach a summary of the updated scores/information to the REED. This information should be included in the "Current Evaluation" section on the "Participants and Profile" page of the IEP. Do not complete an *ER* as *ER*s are only used for initials or change in eligibility, not for updating scores.

3 The *ER* needs to be finalized prior to creating the IEP in Tienet or else the PLAAFP will not flow correctly to the IEP.

Frequently Asked Questions about the REED and ER

Q1: When do I need to complete an *ER*?

A1: Whenever a full and individual evaluation is completed, which is needed for initials and change in eligibility. Do not complete an *ER* if the *REED* indicates that current data are sufficient for eligibility.

Q2: What constitutes a change in eligibility?

A2: Termination of special education eligibility, change in primary label, change in qualifying criteria (e.g., adding/removing Math to SLD), and reevaluation that includes a full and individual evaluation because eligibility is questioned.

Q3: What documentation do I need to complete if we have sufficient data in the *REED* to continue eligibility?

A3: A well written *REED* is sufficient to document continued eligibility.

Q4: What documentation do I need to complete if we want to update scores, but do not need to complete a full and individual evaluation?

A4: A brief summary (not a formal report) of the updated scores attached to the REED in Tienet is sufficient. Do not complete an *ER* as updating scores is not a full and individual evaluation. This summary data should also be documented on the reevaluation IEP on the Participants and Profiles section under "Current Evaluations."

Q5: If the team completes a full and individual evaluation, but does not recommend a label change, should the team fill out an *ER*?

A5: Yes, by completing a full and individual evaluation, the team has formally questioned continued eligibility and the *ER* must be filled out. The team should select "Change in Eligibility," on the *ER* even if the actual label will not change.

Q6: What if the team is considering multiple areas of eligibility?

A6: Use just one *ER* and check each area considered on the *ER*, include the necessary information for each and identify one area of disability. In general, our county does not designate secondary disabilities.

Q7: When is a formal report (in addition to the *ER*) needed?

A7: A formal report is no longer needed as the *ER* is a comprehensive, sufficient and consistent method to document the MET's eligibility recommendation.

Q8: What is the MET? How is it different from the *ER*?

A8: The MET is the Multidisciplinary Evaluation Team, not a document. The *ER* is the document that describes the MET's recommendation to the IEP Team.

Q9: What is the best way to include graphs and tables in the *ER*?

A9: You may attach Word or Excel documents to the *ER* in Tienet. A formal report is not necessary as the *ER* is comprehensive and sufficient.

Q10: Is the PLAAFP section of the *ER* required for all situations?

A10: Yes, it is required. The PLAAFP in the *ER* flows into the PLAAFP section of the IEP for initial evaluations for the special education teacher to edit accordingly. For a change of eligibility, the PLAAFP in the *ER* flows into the student's Profile which is helpful for teachers in creating the PLAAFP in the IEP. Also, according to Federal and State rules, the PLAAFP is a required component of the *ER*.

Q11: When a team is considering SLI in addition to another area of eligibility, and the student qualifies for another area, such as SLD, how is this documented on the *ER*?

A11: In this case, the student is eligible for SLD, and ineligible for SLI (as the primary area of disability), yet the student may still receive SLI services.