



# Indiana IEP Walkthrough for MD Team Members

## IIEP Main Page

### Create Caseload

- 1) From the Main Page, select Wizards from the gray menu bar at the top of the screen
- 2) 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"
  - 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
  - e) Click Add Students to Caseload button at the bottom
    - i) or, Add Students to Caseload, then find more to complete another student search and add more students
- 4) Change the location of the check and update database to change from TOR/Case Manager to Team Member and vice versa
- 5) Remove both checks for a student to remove them from the Caseload

### View Caseload

- 1) Select Students from the gray menu bar at the top of the screen
- 2) Click View My Caseload
- 3) TOR/Case Manager or Team Member Caseload displays
  - a) to add or remove students from this list see 1) Create Caseload
  - b) Click on the header of any column to sort by that information
    - i) By default, the list is sorted by student name with the TOR's students listed first
    - ii) 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 Referral Process

- 1) From the Caseload list, click a student's name
- 2) Select a reason for access
  - a) Click continue

## Pre-Conference Planning

### Preconference Planning

- 1) Click Pre-Conference Planning from the Blue Student Menu
  - a) Click Type of Evaluation
    - i) Select the Purpose of meeting that best corresponds to the Referral Request
      - (1) More information may be required depending upon the purpose selected
        - (a) Reevaluation requires selection of the reason for reevaluation
        - (b) Move-in requires enrollment date
          - (i) This purpose is useful if an evaluation had already begun in a previous district
    - b) Multiple purposes may be selected
    - c) Initial (First Steps) is available based on the student's age
    - d) IIEP will not allow some combinations of purposes
      - i) Reevaluation and Initial may not be selected, for example
  - 2) IIEP may prompt for additional information on this page based on the purpose
  - 3) "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

### Existing Data

- 1) Describe strengths of the student
- 2) Describe the concerns of the parent for enhancing the education of the student
- 3) Record information regarding the instructional strategies and research-based interventions in which the student participated
- 4) Review Progress Monitoring Data and record results
  - a) This data help the CCC determine the need for additional testing
- 5) Based upon the data collected and reported here, determine whether there is a need for reevaluation
- 6) As with all pages in IIEP, Conference Notes are available
- 7) "Save" saves the information on the screen
- 8) "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

<p><b>Referral Decision</b></p> <ol style="list-style-type: none"> <li>1) Enter the Referral Date</li> <li>2) Select the Referral Source       <ol style="list-style-type: none"> <li>a) Parent/Legal Guardian</li> <li>b) School/Public Agency</li> </ol> </li> <li>3) Click 'Finalize Referral' to finalize the referral and create a Referral Event in IIEP</li> <li>4) Click "Yes" in the popup window to confirm Finalization of Referral event</li> <li>5) Enter Factors Considered       <ol style="list-style-type: none"> <li>a) Capture all relevant data to the decision to confirm or refuse the request to evaluate</li> </ol> </li> <li>6) Based upon the Factors Considered, select the public agency's response to the request to conduct an educational evaluation       <ol style="list-style-type: none"> <li>a) Choose "Yes" to confirm the request to evaluate           <ol style="list-style-type: none"> <li>i) School/Public Agency requests are automatically confirmed</li> <li>ii) Document the decision to conduct the evaluation</li> </ol> </li> <li>b) Choose "No" to refuse a request to evaluate           <ol style="list-style-type: none"> <li>i) Document the decision to refuse to evaluate</li> <li>ii) All Notices may be printed in Spanish or English               <ol style="list-style-type: none"> <li>(1) If Spanish is selected, IIEP will print two copies. One copy will print in Spanish and the other in English</li> </ol> </li> <li>iii) Create Draft or Final Notice of Evaluation Refusal               <ol style="list-style-type: none"> <li>(1) This halts the process and creates an evaluation refusal event in IIEP</li> </ol> </li> </ol> </li> </ol> </li> <li>7) "Save" saves the information on the screen</li> <li>8) "Save &amp; Continue" saves the information on the screen and checks it against IIEP's Rules of Completion       <ol style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> </ol> </li> </ol>	
<p><b>Eligibility Categories and Assessments</b></p> <ol style="list-style-type: none"> <li>1) Indicate the Suspected Disability Categories</li> <li>2) Multiple Categories may be selected</li> <li>3) All required assessment domains are automatically selected under 'Assessment Domains to be Investigated for this Evaluation'</li> <li>4) Additional assessment domains may be selected by checking the box next to the domain</li> <li>5) All Notices may be printed in Spanish or English       <ol style="list-style-type: none"> <li>a) If Spanish is selected, IIEP will print two copies. One copy will print in Spanish and the other in English</li> </ol> </li> <li>6) 'Create Draft or Final Notice of Evaluation'       <ol style="list-style-type: none"> <li>a) Button name will reflect selected process           <ol style="list-style-type: none"> <li>i) Notice of Reevaluation</li> <li>ii) Notice of Initial Evaluation</li> </ol> </li> </ol> </li> </ol>	

<ul style="list-style-type: none"> <li>iii) Notice of Initial Following ...</li> <li>7) "Save" saves the information on the screen</li> <li>8) "Save &amp; Continue" saves the information on the screen and checks it against IIEP's Rules of Completion <ul style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> </ul> </li> </ul>	
<b>Evaluation Process</b>	
<p><b>Create MD Team</b></p> <ul style="list-style-type: none"> <li>1) Current Teacher of Record/Case Manager should display the current Case Manager <ul style="list-style-type: none"> <li>a) To change this select the new Case Manager from the dropdown list</li> </ul> </li> <li>2) Click the "Select Team" button to choose the Case Conference Committee Team</li> <li>3) Update Team Page <ul style="list-style-type: none"> <li>a) Current TOR/Case Manager</li> <li>b) Parent(s) who will receive IEP Information</li> <li>c) Users within IIEP that may access IEP data at this school <ul style="list-style-type: none"> <li>i) check users that will be a part of the CCC team</li> <li>ii) check the view only box to limit team member access to read only</li> </ul> </li> <li>d) Once all information is accurately recorded, click "Save" or "Save &amp; Continue" <ul style="list-style-type: none"> <li>(1) If all parts are complete, IIEP returns to Create CCC Team</li> </ul> </li> </ul> </li> <li>4) To add or edit the CCC team click the "Select Team" button</li> <li>5) As with all pages in IIEP, Conference Notes are available</li> <li>6) "Save" saves the information on the screen</li> <li>7) "Save &amp; Continue" saves the information on the screen and checks it against IIEP's Rules of Completion <ul style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> </ul> </li> </ul>	
<p><b>Assign MD Team Roles</b></p> <ul style="list-style-type: none"> <li>1) The required multidisciplinary team members are listed based upon the selected disability categories</li> <li>2) Click the dropdown box beside each listed role to assign a team member</li> <li>3) "Save" saves the information on the screen</li> <li>4) "Save &amp; Continue" saves the information on the screen and checks it against IIEP's Rules of Completion <ul style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> </ul> </li> </ul>	

<p><b>Parental Consent Contacts</b></p> <ol style="list-style-type: none"> <li>1) Record the parent’s response to the request to evaluate.</li> <li>2) Record the date signed consent to evaluate was received by the School/Public Agency</li> <li>3) Identify the communication entry or entries that corresponds to the request to evaluate</li> <li>4) “Save” saves the information on the screen</li> <li>5) “Save &amp; Continue” saves the information on the screen and checks it against IIEP’s Rules of Completion       <ol style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> <li><b>c) If the parent refused to consent to evaluation the process ends by clicking “Save &amp; Continue”</b></li> <li><b>d) If the parent revokes consent to evaluate change consent to “No” and the date to reflect the refusal</b></li> </ol> </li> </ol>	
<p><b>Existing Data</b></p> <ol style="list-style-type: none"> <li>9) Describe strengths of the student</li> <li>10) Describe the concerns of the parent for enhancing the education of the student</li> <li>11) Record information regarding the instructional strategies and research-based interventions in which the student participated</li> <li>12) Review Progress Monitoring Data and record results       <ol style="list-style-type: none"> <li>a) This data help the CCC determine the need for additional testing</li> </ol> </li> <li>13) Based upon the data collected and reported here, determine whether there is a need for reevaluation</li> <li>14) As with all pages in IIEP, Conference Notes are available</li> <li>15) “Save” saves the information on the screen</li> <li>16) “Save &amp; Continue” saves the information on the screen and checks it against IIEP’s Rules of Completion       <ol style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> </ol> </li> </ol>	
<p><b>Assessment Data</b></p> <ol style="list-style-type: none"> <li>1) Upload any reports, documents, or assessments relevant to the student</li> </ol>	

<p>evaluation</p> <ol style="list-style-type: none"> <li>2) All uploaded documents will be listed</li> <li>3) Enter start and end date of each assessed domain</li> <li>4) Record the instrument(s), evaluator(s), and end date(s) for each assessment tool</li> <li>5) Document the findings of each tool in the Narrative space for each domain</li> <li>6) Provide a synthesized summary of all assessments completed or reviewed</li> <li>7) Click 'Create Final Education Evaluation Report'</li> <li>8) All Notices may be printed in Spanish or English</li> <li>9) "Save" saves the information on the screen</li> <li>10) "Save &amp; Continue" saves the information on the screen and checks it against IIEP's Rules of Completion <ol style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> </ol> </li> </ol> <p>If all parts are complete, IIEP advances to the next page</p>	
<p><b>Notice of Initial Findings and Proposed Actions (Initials Only)</b></p> <ol style="list-style-type: none"> <li>1) Complete each text area in response to the prompts provided</li> <li>2) "Save" saves the information on the screen</li> <li>3) "Save &amp; Continue" saves the information on the screen and checks it against IIEP's Rules of Completion <ol style="list-style-type: none"> <li>a) If any part is incomplete or missing, error messages will appear at the top of the page</li> <li>b) If all parts are complete, IIEP advances to the next page</li> </ol> </li> <li>4) Notice of Initial Findings and Proposed Actions prints as part of the Notice of Case Conference for Initial Case Conferences Only</li> </ol>	