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|  | Initial Evaluation | |
| **IIEP Main Page** | | |
| **The student is referred for an initial evaluation by parent or school.**  **Add student to Caseload**  1) From the Main Page, select Wizards from the gray menu bar (on top of page)  2) Select Caseload Setup Wizard  3) Click the button at the bottom of the screen labeled, “Add More Students to Caseload”  a) Enter search criteria (last name and first is typically good enough)  b) Click View Students button  c) Students meeting search criteria display on screen  d) Check TOR/Case Manager next to the student to be evaluated  e) Click Add Students to Caseload button at the bottom  **To view the student and access referral process**  1) Select Students from the gray menu bar at the top of the screen  2) Click View My Caseload (bottom button)  3) TOR/Case Manager or Team Member Caseload displays  4) From the Caseload list, click a student’s name  2) Select a reason for access  a) Click continue | | Principal or Designee |
| **Pre-Conference Planning** | |  |
| 1) Click on Pre-Conference Planning on blue menu bar  The referral process for Initial Provision of Services begins here  2) Enter type of evaluation- Initial or Initial following interventions (Save and Continue)  3) Enter Existing Data- It is important that this information is thorough. The present level information is important (to the psychologist and all team members) as the beginning or starting point for the initial evaluation. DO NOT SKIP THIS PAGE. Gather information needed from general education teacher, parent, and other appropriate participants to complete Existing Data   * Describe the strengths of the student: academic, developmental, communication, functional, behavioral…etc * Describe the concerns of the parent for enhancing the education of the student * Describe the instructional strategies and research-based interventions that have been tried AND the students response to them * Enter progress monitoring data: actual data, not when progress monitoring will take place in the future.   4) Enter the students’ present levels: How are they performing in the educational setting…. (Save and Continue)  5)Referral Decision: Enter the date of the referral and who (parent or school) Click ‘Finalize Referral’ to finalize the referral and create a Referral Event in IIEP  6)Click “Yes” in the popup window to confirm Finalization of Referral event  Enter Factors Considered   * Capture all relevant data to the decision to confirm or refuse the   request to evaluate  7) Based upon the Factors Considered, select the public agency’s response to  the request to conduct an educational evaluation   * Choose “Yes” to confirm the request to evaluate * School/Public Agency requests are automatically confirmed   Document the decision to conduct the evaluation  ***NOTE: When the school Refuses the request to evaluate:***  *-Choose “No” to refuse a request to evaluate (“No” is rarely chosen)*  *-Document the decision to refuse to evaluate*  *All Notices may be printed in Spanish or English*  *If Spanish is selected, IIEP will print two copies. One copy will*  *print in Spanish and the other in English*  *-Create Draft or Final Notice of Evaluation Refusal (rarely chosen)*  ***This halts the process and creates an evaluation refusal event in IIEP*** | | Principal or Designee |
| 8)Eligibility Categories and Assessments:   * Principal or designee informs the psychologist that the Existing Data is complete and the psychologist confers with needed team members * Principal removes themselves at TOR/Case manager and changes their access to Team Member utilizing the Wizards tab   9) Psychologist completes the SUSPECTED disability areas by checking the appropriate boxes. The required assessment domains will automatically fill in based on the suspected disability areas chosen. Additional assessment domains may be chosen by checking the box next to the domain.  10) Psychologist creates a DRAFT Notice of Initial Evaluation to review for accuracy  11) Psychologist creates a FINAL Notice of Initial Evaluation   * Psychologist e-mails the principal/designee, attaching the Notice and informs them it is complete. | | Principal or designee  Psychologist  Other Team Members |
| 12) Obtain Parent (Signature) Permission  13) Send parent permission (signed notice), social developmental history and teacher counselor information form to Student Services. | | Principal or Designee |
| 14) Student Services Secretary completes the Parental Consent Contacts under the Evaluation Process Tab and gives referral packet documents to the psychologist with a note indicating Compliance Date. | | Student Services |
| Evaluation Process | |  |
| **Create MDTeam**  **Assign MD Team Roles** | | Psychologist |

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| **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) “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 | Psychologist |
| **Parental Consent Contacts**  This portion should be completed already.  If not, complete the dates as prompted on the screen. | Student Services Secretary |
| **Existing Data**  This portion is already complete | Principal or Designee |
| **Assessment Data**  1) Upload any reports, documents, or assessments relevant to the student evaluation   * Upload any and all reports here, including psycho-educational evaluation reports, OT/PT evals, Speech evals, Dr’s summaries, Autism evals….etc. Any and all reports pertinent to this student’s evaluation are uploaded. This is done by choosing Browse, locating the report and attaching it. * All uploaded documents will automatically be listed   2) Enter summary information beside each domain (+). Each domain is to be completed by the appropriate team member. Exercise good communication between team members!  3)Enter start and end date of each assessed domain  4) Record the instrument(s), evaluator(s), and end date(s) for each  assessment tool  5) Document the findings of each tool in the Narrative space for each domain  6) Provide a synthesized summary of all assessments completed or reviewed  7) Click ‘Create Final Education Evaluation Report’ in Indiana IEP and ‘Save and Continue’ | Psychologist and Multi Disiplinary Team Members |
| **Psychologist distributes psycho-educational evaluation report per district procedures. Schedule the Case Conference** |  |