



SuccessEd

SE Manager User Guide

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Table of Contents

Controls in SE Applications	6
Special Education Student Statuses	8
Special Education Statuses Changing Automatically	10
Special Education Statuses to be Changed Manually.....	11
SE Manager Compliance Calendar	12
SE Manager Bulk Print Forms.....	13
Forms	14
Student Forms Screen	14
Beginning a New Form.....	15
Editing a Draft Form.....	16
Deleting a Draft Form	16
Form Shortcuts.....	17
SE Manager – IEP Meeting Types	18
Individualized Education Program Meeting (IEP Meeting)	19
I. Review of Evaluation Data.....	21
Adding Other Evaluations.....	22
Editing/Deleting Evaluations	22
II. Determination of Eligibility	23
III. Present Levels of Academic Achievement and Functional Performance.....	24
Disability Impact Statement	24
Physical.....	25
Behavioral	26
Discipline.....	26
Functional.....	26
Academic.....	27
IV. Determination of Services to Be Provided	28
Instructional Schedule	29
Instructional Accommodations and/or Modifications	32
Related Services	32
Supplementary Aids and Services.....	33
Creating Next Schedule	35
Creating an Alternate Schedule.....	36
INSTRUCTIONAL ARRANGEMENT/SPEECH COUNT NOTES	37
Section 2 Warning Message.....	39
Schedule Page Warning Messages	40
ECSE Location Codes.....	41




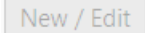
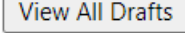














Instructional Arrangements	42
IV-B. State Assessments.....	43
State/District Assessment Decisions	43
Selecting State Assessments	44
V. Consideration of Least Restrictive Environment	49
VI. Extended School Year Service (ESY)	51
VII. Graduation	52
VIII. Assurances	53
IX. Committee Membership	54
X. Deliberations.....	57
IEP Meeting PEIMS 163 Data Elements.....	58
Service Plan Meeting	63
Amendment to the Individualized Education Program.....	64
Suggested Uses for Amendments	64
Brief Individualized Education Program (Brief IEP)	65
Suggested Uses for Brief IEPs.....	65
Dismissals and DNQs.....	65
Transfer Individualized Education Program	66
Additional IEP Meeting Forms	66
Accelerated Education Plan.....	66
Accelerated Plan/Intensive Program of Instruction	67
Accept Alternative Placement Services	67
Administrative Discipline Plan	68
Annual Goals.....	68
Behavior Intervention Plan	69
Behavior Intervention Plan (BIP)	69
Child Outcome Summary (COS)	70
Consent for Evaluation	71
Consent For Eval – Parent Declined Eval.....	72
Consent for Release: VI and DB	73
Consent to Transfer Assistive Technology Devices	73
Consent: Initial Placement	74
Consent: Psychological Evaluation/Services	74
Consent: Residential Care Release	75
Consent: Transition Release	75
Contact Log	75
Decline Alternative Placement Services	76









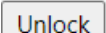
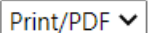
Decline Special Education Services	76
Eligibility Transportation	77
Extended School Year (ESY) Information	77
Functional Behavioral Assessment (FBA)	78
Functional Behavioral Review	78
Graduation Plan: Course of Study	79
IEP Agenda	79
Incident Report: Restraint or Time-out.....	79
Medical Exception STAAR Alt 2 and TELPAS Alternate	80
No Authentic Academic Response STAAR Alternate 2 and TELPAS Alternate.....	80
Notice of Decision: Prior Written Notice	81
Notice of Evaluation	82
Notice of IEP Meeting	83
Notice of Release/Consent to Request Confidential Information	83
Notice of Service Plan Meeting	83
Notice to Parent of Rights Transferred.....	84
Notice to Parent of Transfer of Rights	84
Notice to the Parent to Release Information for SHARS.....	85
Notice: Parent Revocation of Special Education Services.....	85
Parent/Guardian Acknowledgement	86
Parent-Directed Special Education Services (PDSSES).....	86
Physician’s Referral/Prescription for OT Services.....	87
Physician’s Referral/Prescription for PT Services	87
Physician’s Information.....	88
Physician's Release from Homebound	88
Procedural Safeguards Log	89
Receipt of TSBVI Information	89
Receipt of TSD Information	89
Request For Records	90
Residential Facility Tracker Information.....	90
Review of Existing Evaluation Data (REED)	90
Speech Therapist Referral for Speech and Language Therapy Services.....	91
STAAR Alternate 2 Participation Requirements	91
Summary Report: Special Education/Related Services.....	92
Supplement: Assistive Technology (AT).....	92
Supplement: Autism	93
Supplement: Communication Needs (DHH).....	93

Supplement: Compensatory Services.....	93
Supplement: COVID-19 Special Education Recovery Act	94
Supplement: Extended School Year (ESY)	94
Supplement: Failure Review	95
Supplement: Graduation with Foundations	95
Supplement: Language Proficiency Assessment Committee (LPAC)	95
Supplement: Manifestation Determination Review	96
Supplement: Medically Fragile	96
Supplement: Out of District Placement.....	97
Supplement: Personal Care Services.....	97
Supplement: Referral to RDSPD	97
Supplement: Transition	98
Supplement: Visual Impairment (VI)	98
Supporting Documents	99
Surrogate Parent	99
TELPAS Alternate Participation Requirements	99
Transition: Coordinated Set of Activities.....	100
Transition: Follow-Up Assessment	100
Transition: Parent Survey	100
Transition: SPP Indicator 13 Folder Review	101
Transition: Student Interview	101
Transition: Summary of Performance.....	101
Transition: Teacher Survey	105
Transportation Information	105
Locking a Single Form	106
Print/Lock Form Set	107
Printing Draft Forms.....	108
Locked Tab	108
History Tab	109
Uploading Documents to History Tab	110
Unable to Add or Edit Draft Forms	111
Clearing the Cache.....	111
Appendix A: List of Forms in SE Manager New/Edit Forms dropdown	114
Appendix B: List of Forms in SE Basic New/Edit Forms dropdown.....	116
Appendix C: Programs – Special Education Reports	118
Appendix D: SPP Indicator Data Sources	124
SPP Indicator 11 Data Sources.....	124

SPP Indicator 12 Data Sources.....	125
SPP Indicator 13 Data Sources.....	126
SPP Indicator 6 Data Sources	126
SPP Indicator 7 Data Sources	127

Controls in SE Applications

	Green Checkmark: User is Active on the District Admin > Users > Add/Edit Users screen.
	Stop Sign: User is Inactive on the District Admin > Users > Add/Edit Users screen.
	Dropdown: Click to select or enter information. Some dropdowns allow users to enter unique entries while others are limited to the available options.
	New/Edit: Click to load selected form, edit current draft, or add a new draft.
	View All Drafts: Click to see all current drafts in program.
	Plus: Click to add/load form.
	Save: Click to save form.
	Validation Error: Prevents save and indicates a required field needs to be addressed.
	Delete: Click to delete form. Once a form has been deleted, it cannot be recovered.
	Orange Pencil: Click to edit Shared List for the field for users with Admin [District] and ListAdmin [District] or access Student Information.
	Shared Lists: Click to access shared lists. Select items from shared list before manually typing into field. If multi-select list, select all items before closing out list.
	Resize Control: Click and drag to expand text box when using Chrome, Safari, Firefox.
	Radio: A forced choice option (e.g., Yes/No) and, once clicked, cannot be de-selected.
	Checkbox: Click to make selection(s).
	Calendar: Click to choose date from calendar.
	Clock: Click to choose time.
	Filter: Click to filter a search.
	Red X: Click to delete file.
	Links: Found in a variety of places across the application and will take users to a different screen or section.

Controls associated with Data Grids	
	Add new record/Add record/Add: Click to add a row into a data grid.
	Checkmark/Insert: Click to insert an entry.
	X/Cancel: Click to cancel record.
	Caret: Click to expand record.
	Refresh: Click to refresh data grid and remove selected Instructional Arrangement Override.
	Pencil: Click to edit entry.
	X: Click to delete entry.
Controls associated with Locking, Unlocking, and Printing	
	Lock: Click to lock completed form.
	Unlock: Click to unlock form.
Select version to print: 	Print/PDF: Click to print form or create pdf.

Special Education Student Statuses

***NOTE: When entering new students into the application they will usually have one of two statuses, Referral or Transferred. (See **SE Application General Information** User Guide for information on adding students to the application).

The screenshot shows the 'Special Education Compliance' form. A red box highlights the 'Status' dropdown menu, which is open to show a list of options: Referral, Active, Dismissal, District Declined Eval, DNQ, Drop Out, Graduated, Initial, Moved, Not Active, Not Enrolled, Other, Parent Declined Eval, Parent Refusal, Parent Revoc., Private/Home, Referral, Transferred, and Withdrawn. The 'Referral' option is currently selected. The form includes various input fields for dates, dropdown menus for funding types and instructional arrangements, and radio buttons for behavior intervention plans. There are also 'Refresh' buttons and a table with columns for 'Current Date' and 'Needed By'.

For forms to be editable in the Special Education programs, a student must have one of the active statuses (e.g., Active, Initial, Private/Home, Transferred, or Referral). For special education students, some status changes are automated during locking of forms or rollover. It is necessary to designate a status when a student is first entered into the application. Typically, one of two statuses are appropriate: Transferred (when a student transfers into a district and is already eligible for special education services) or Referral (when a student is referred to special education for evaluation). Other events that require a manual change of status include when a student drops out, moves out of the district, and/or is withdrawn. When students transfer in, move away, or are withdrawn from a district, there are additional fields in the student's Enrollment tab that users may want to address manually (see below). As appropriate, complete the following fields: Date Student Entered District, Previous School District, Records Received On, Date

Student Left District, Next School District, and Records Forwarded On. Status changes that are triggered by the locking of a form include Initial, Private/Home, Transferred, Dismissal, DNQ, and Parent Revocation.

- a. **Active**: Student currently receiving special education services and/or received special education services from the district last year.
- b. **Dismissal**: The ARD Committee has determined the student is no longer eligible for special education and related services.
- c. **District Declined Eval**: This status is manually selected on Program Compliance when the district declines to evaluate the student.
- d. **DNQ**: Student was a *Referral* prior to completion and locking of the IEP Meeting form, but the ARD Committee does not find student eligible for special education and/or related services.
- e. **Drop Out**: Student has dropped out of school and is no longer enrolled in the district.
- f. **Graduated**: Student who has graduated.
- g. **Initial**: Student was a *Referral* to special education, found eligible, and the first IEP Meeting has been locked. ***NOTE: Student's status will stay as Initial all year long. Once Rollover has occurred, the status will change to reflect Active.
- h. **Moved**: Student received special education services during the current school year and moved to another school district.
- i. **Not Active**: Student is not in special education and does not fit in any of the other categories.
- j. **Not Enrolled**: Student is tracked by the district for reporting purposes but is not enrolled.
- k. **Other**: Student is deceased, completed GED, etc.; does NOT include student who moved to another district, was institutionalized, incarcerated, or enrolled in private school but not receiving services from the school district.
- l. **Parent Declined Eval**: This status is either manually selected or automatically populated upon locking the Consent for Evaluation when the Type of Consent is Initial, and no is selected as the parent response for 'I give my permission for testing'.
- m. **Parent Refusal**: Student was referred to special education and found eligible, but whose parents refused services.
- n. **Parent Revocation**: Student is currently receiving special education services, but parent(s) puts in writing that they are revoking permission for these services.
- o. **Private/Home**: Student is receiving special education services from the district through a Service Plan and is enrolled in private or home school. When a student turns 5 and has a status of Private/Home, the program will change the ECSE Indicator to No and the ECSE Location Code to 0.
- p. **Referral**: Student who has been referred to special education for an evaluation but has not had an IEP Meeting.

- q. **Transferred**: Student arrives from another district and already qualifies for special education. ***NOTE: Student's status will stay as Transfer all year long unless the student leaves or no longer qualifies. Once Rollover has occurred, the status will change to reflect Active.
- r. **Withdrawal**: Student was expected to present themselves for enrollment on the first day of school but was a "No Show". No services were provided during the current school year.

Special Education Statuses Changing Automatically

Within the SuccessEd application, there are some special education statuses that will change automatically upon lock of forms.

- ❖ **Referral to Initial**: If a student qualifies for special education, upon lock of the **IEP Meeting** form with eligibility, the student's status on Program Compliance will change to **Initial**.
- ❖ **Referral to DNQ**: If a student does not qualify for special education, upon lock of the **Brief Individualized Education Program (IEP)** form with no eligibility, the student's status on Program Compliance will change to **DNQ**.
- ❖ **Initial to Active**: Once SuccessEd has performed the end of year Rollover of student data, students with a status of Initial on Program Compliance from the previous school year will change to **Active**.
- ❖ **Transferred to Initial**: If a student who transferred into the district from another state and is newly evaluated for special education and qualifies, upon lock of the **IEP Meeting** form, the student's status on Program Compliance will change to **Initial**. ***NOTE: When the **Verification of IEP** within the **Transfer IEP** has the third radio selected, and has an initial consent, the student will be considered a referral per SPP Indicator 11 guidelines.
- ❖ **Transferred to Active**: Once SuccessEd has performed the end of year Rollover of student data, students with a status of Transferred on Program Compliance from the previous school year will change to **Active**.
- ❖ **Active to Dismissal**: If a student no longer qualifies for special education, upon lock of the **Brief Individualized Education Program (IEP)** form with no eligibility, the student's status on Program Compliance will change to **Dismissal**. ***NOTE: Locking any IEP Meeting without eligibilities indicated on Section II will result in the status automatically changing to Dismissal and will result in student forms no longer being editable.
- ❖ **Active to Graduated**: Student who has graduated at the end of the school year will change to **Graduated**.
- ❖ **Transferred to Dismissal**: If a transfer student no longer qualifies for special education, upon lock of the **Brief Individualized Education Program (IEP)** form, the student's status on Program Compliance will change to **Dismissal**.
- ❖ **Referral to Parent Declined Eval**: If the parent selects No for the 'I give my permission for testing.' statement, on lock of the **Consent for Evaluation** form, the student's status on Program Compliance will change to **Parent Declined Eval**.
- ❖ **Active to Parent Revoc**: If the parent(s) of an active student revokes consent for special education services, upon lock of the **Notice: Parent Revocation of**

Special Education Services form, the student's status on Program Compliance will change to **Parent Revoc.**

- ❖ **Active/Initial to Parent Refusal**: If the parent(s) of an active student refuses consent for special education services, upon lock of the **Decline Special Education Services** form, the student's status on Program Compliance will change to **Parent Refusal**. ***NOTE: This form should not be locked as part of a form set. Locking the form individually will result in the student's status automatically changing to **Parent Refusal**.

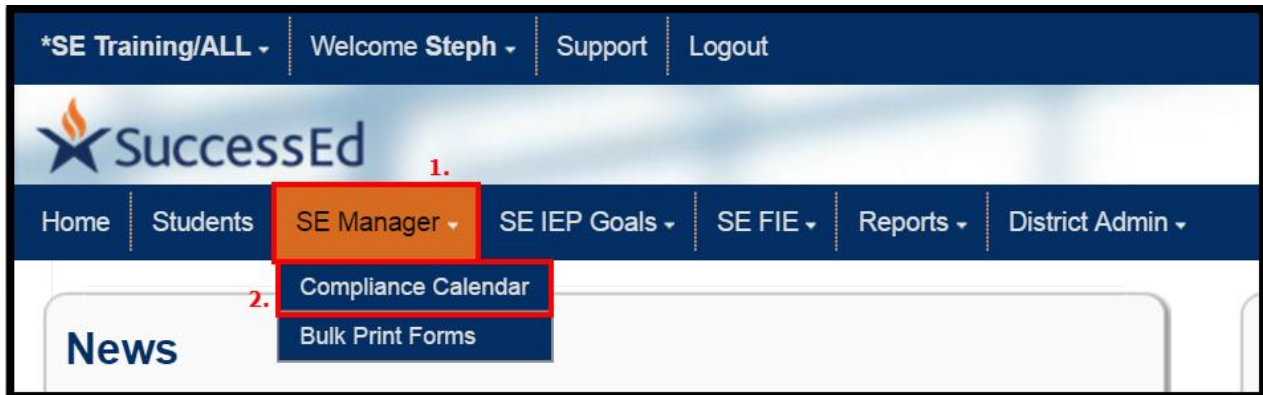
Special Education Statuses to be Changed Manually

Within the SuccessEd application, there are some special education statuses that will need to be changed manually via Program Compliance.

- ❖ **Active to Withdrawn**: If the student is a no show as of the first few weeks of school, staff will want to change the student's status on Program Compliance to **Withdrawn**. Enter in the date the student withdrew into the **Date Student Left District** field on **Enrollment** and **Services Start Date** field on Program Compliance. Click **Save** at the bottom of each screen.
- ❖ **Active to Moved**: If the student moves out of the district, staff will want to change the student's status on Program Compliance to **Moved**. Enter in the date the student moved into the **Date Student Left District** field on **Enrollment** and **Services Start Date** field on Program Compliance. Click **Save** at the bottom of each screen.
- ❖ **Active to Drop Out**: If the student drops out of school, staff will want to change the student's status on Program Compliance to **Drop Out**. Enter in the date the student dropped out into the **Date Student Left District** field on **Enrollment** and **Services Start Date** field on Program Compliance. Click **Save** at the bottom of each screen.
- ❖ **Active to Graduated**: If the student completes graduation requirements prior to the end of the school year will require their status be changed manually to **Graduated** and the **Services Start Date** to note the date of graduation and discontinuation of services.

SE Manager Compliance Calendar

The special education compliance calendar can be found via SE Manager, SE IEP Goals, and SE Basic.



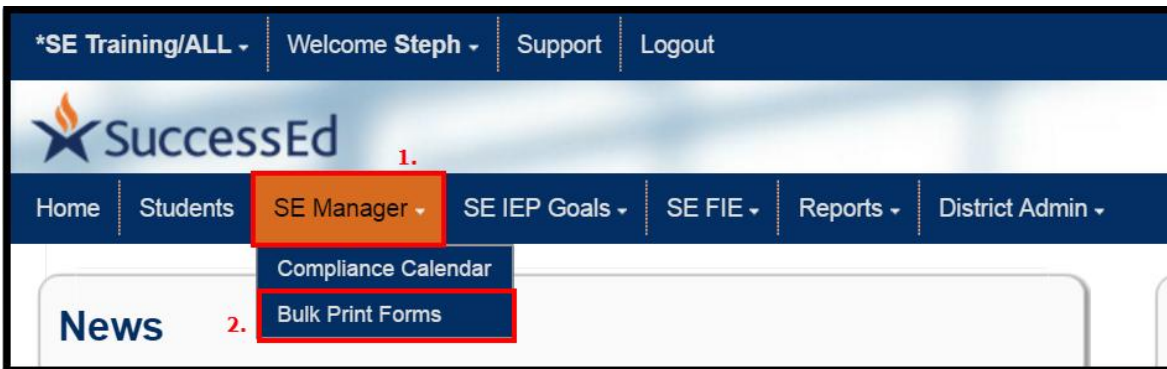
1. Choose **SE Manager** from the **Home** screen.
2. Choose **Compliance Calendar**.

The screenshot shows a calendar view from July 26 to August 6. The calendar is color-coded: red boxes indicate due dates for FIE and Indicator 11 FIIE; green boxes indicate scheduled IEP meeting dates and times; blue boxes indicate initial IEP meeting due dates and annual due dates. Red boxes and numbers highlight specific items: Sophie Marullo (01 Jul, 3.), Penelope Marullo (09 Jul), Caleb Test (22 Jul, 4.), and Marcus Baugh (24 Jul, 5.).

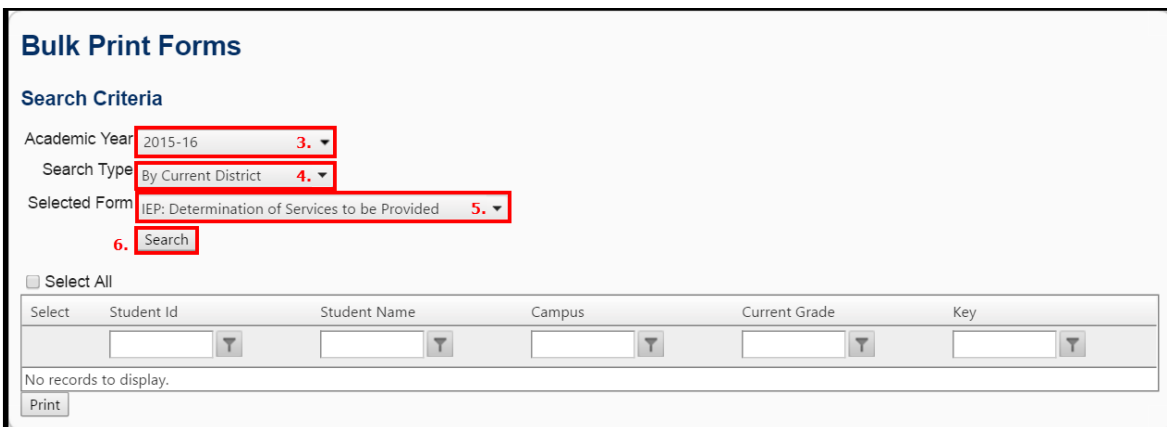
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	01 Jul	2
					Sophie Marullo	
3	4	5	6	7	8	9
						Penelope Marullo
10	11	12	13	14	15	16
	Kenjo Baker (9:00 AM)			Caleb Test (8:00 AM)	Aladin Henson (9:00 AM)	
17	18	19	20	21	22	23
		Star Student (10:00 AM)			Caleb Test (8:00 AM)	
24	25	26	27	28	29	30
Marcus Baugh	Jo Jo Barsalou (8:00 AM)	Emilea Ariciaga (8:00 AM)	Marcus Benton (10:00 AM)			
			Marcus Benton (9:00 AM)			
31	01 Aug	2	3	4	5	6
Autumn Martinez						

3. Items indicated in Red are FIE due dates and Indicator 11 FIIE due dates for Active (e.g., Active, Initial, Private/Home, Transferred) students in the selected campus/district. Clicking on student's name will take user to that student's Demographics page.
4. Items indicated in Green are scheduled IEP meeting dates and times for Active (e.g., Active, Initial, Private/Home, Transferred) students in the selected campus/district. Clicking on student's name will take user to that student's Demographics page.
5. Items indicated in blue are Indicator 11/12 Initial IEP meeting due dates and Annual due dates for Active (e.g., Active, Initial, Private/Home, Transferred) students in the selected campus/district. Clicking on student's name will take user to that student's Demographics page.

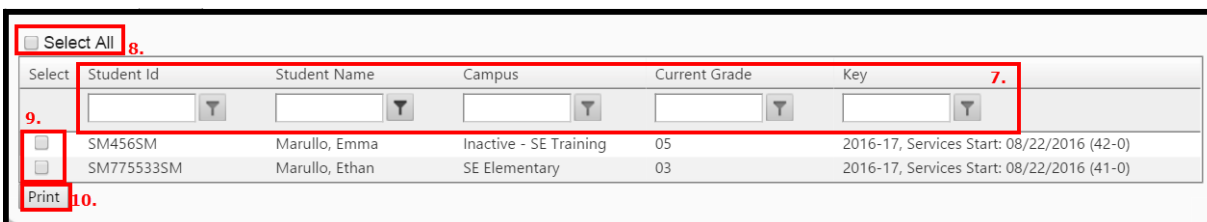
SE Manager Bulk Print Forms



1. Choose **SE Manager** from the **Home** screen.
2. Choose **Bulk Print Forms**.



3. **Academic Year:** The current Academic Year will be set as the default. Once Academic Year has been set for the next year, users will be able to print bulk forms for the following school year.
4. **Search Type:** Choose **By Case Manager** or **By Current District** if attached to **All** campuses. Choose **By Case Manager**, **By Current District** or **By Current Campus** if attached to a specific campus.
5. **Selected Form:** Choose **IEP: Determination of Services to be Provided** to print schedules pages or **IEP: State Assessments** to print state assessment pages.
6. Click **Search**.



7. Enter information to further sort list of students (e.g., sort by Student ID, Student Name, Campus, Current Grade, or Key). *****NOTE:** Enter text into the field(s) to sort by the specific filter. Be sure to list enter the text exactly as it displays within the application.
8. Click **Select All** to select all of the students listed.
9. Click to print specific students.

10. Click **Print** to print forms.

Forms

***NOTE: 1) If a form is not visible in your New/Edit Forms dropdown, your district administrator(s) may have hidden the form. 2) Once a form has been locked, the data previously entered into that form will pull forward into newly drafted forms. 3) If forms created during the current academic year are left in a draft status, once rollover occurs, the academic year listed on the form will be updated to reflect the new academic year. 4) Once an IEP Meeting form (e.g., Amendment, Brief, IEP, Service Plan, Transfer) has been locked, users are no longer able to edit fields on the student Program Compliance screen unless the user has the Administrator [District] user role assigned.

Student Forms Screen

The screenshot shows the SuccessEd Student Forms interface. At the top, there is a navigation bar with 'SE Manager' highlighted. Below it, the 'Student Forms' section has a dropdown for 'Product' (SE Manager) and a search field for 'Marullo, Adelaide (5/30/2016) YY961025'. A summary bar shows 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' and an 'Edit Student Information' button. Below this are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open for 'New/Edit' forms, showing 'Draft Forms: (3)' and a 'Print/Lock Form Set' button. A table lists three draft forms with their section names and last edit dates.

Section Name	Last Edit
Annual Goals From 5/3/2021 to 5/2/2022	7/13/2021 2:55:33 PM by Stephanie Marullo RM
Individualized Education Program Meeting 5/3/2021 - Annual	7/13/2021 2:54:51 PM by Stephanie Marullo RM
Notice of IEP Meeting 5/3/2021	7/13/2021 2:55:12 PM by Stephanie Marullo RM

1. **Product:** Select a product from dropdown menu. Product can also be chosen from the second blue navigation bar above the Student Forms screen.
2. **Student:** Enter at least two letters of a student's name. Users can also search by date of birth, student ID, and typing in a few letters of the last name and first name (e.g., Mar, Ar). ***NOTE: If student does not display in the Student dropdown, go to the students Enrollment screen to verify if there is a check for Special Education; also go the students Program Compliance screen to verify if the student has one of the Active statuses for Special Education (e.g., Active, Initial, Private/Home, Transferred, or Referral).
3. Hover within the field to see a re-cap of information by program for the selected student.
4. **Edit Student Information:** Click button to be quickly taken to Student Information screen for selected student.

5. **New/Edit Forms:** Select this tab to start new forms and edit drafts.
6. **Locked:** This tab provides a location for District Admins to unlock forms and is for administrative use only.
7. **History:** Select this tab to view/print PDFs of locked forms as well as other historical documents uploaded to the student's record.
8. **Form:** Select a form from dropdown menu.
9. **New/Edit Forms:** After selecting a product, student, and form, click **New/Edit** to draft a new form or to edit a form in draft.
10. **View All Drafts:** Click to return to the Student Forms screen. All forms in draft for the selected product will be listed here (e.g., all drafts within SE Manager).
11. **Draft Forms:** A list of draft forms for the current product.
12. **Print/Lock Form Set:** Click to Print or Lock the forms in the Form Set. This button is only visible in the SE Manager, SE FIE, and SE 504 programs. ***NOTE: Annual Goals can no longer be locked as part of an IEP Meeting Form Set. The Annual Goals form will need to be locked as a separate form via the SE IEP Goals program or the SE Manager program.

Beginning a New Form

The screenshot shows the 'Student Forms' interface. At the top, there are two dropdown menus: 'Product' (highlighted with a red box and '1.') set to 'SE Manager', and a student selection dropdown (highlighted with a red box and '2.') showing 'Marullo, Adelaide (5/30/2016) YY961025'. Below these are tabs for 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a form selection dropdown (highlighted with a red box and '3.') showing '-- Select --' and a 'New / Edit' button (highlighted with a red box and '4.'). A 'View All Drafts' button is also visible.

1. **SE Manager** can be chosen from the second blue navigation bar above the Student Forms screen or selected from the product from dropdown menu
2. Enter at least two letters of the student's last name for the name to appear in the **Select a student** dropdown menu.
3. Under **New/Edit Forms**, select the form you want to add from the dropdown menu.
4. Click the **New/Edit** button. ***NOTE: If a form is currently in draft, this button will say **Edit Draft**.

Editing a Draft Form

The screenshot shows the 'Student Forms' interface for a student named Marullo, Adelaide. The 'Draft Forms' section contains a table with three rows. The second row, 'Individualized Education Program Meeting 5/3/2021 - Annual', is highlighted with a red box and a red '2.' next to it. A red box labeled '1.' points to the 'View All Drafts' button in the top right corner.

Section Name	Last Edit
Annual Goals From 5/3/2021 to 5/2/2022	7/13/2021 2:55:33 PM by Stephanie Marullo RM
Individualized Education Program Meeting 5/3/2021 - Annual	7/13/2021 2:54:51 PM by Stephanie Marullo RM
Notice of IEP Meeting 5/3/2021	7/13/2021 2:55:12 PM by Stephanie Marullo RM

1. Click **View All Drafts** to see all current drafts.
2. Click on form name to edit the draft form.

Deleting a Draft Form

This screenshot is identical to the one above, showing the 'Student Forms' interface with the 'Draft Forms' table. A red box labeled '1.' points to the 'View All Drafts' button, and a red box labeled '2.' points to the 'Individualized Education Program Meeting 5/3/2021 - Annual' row.

1. Click on **View All Drafts** on the Student Forms screen.
2. Click on form name to open the draft form.

The screenshot shows the 'Draft Forms: Notice of IEP Meeting (1)' screen. It features a table with three rows. The first row, 'Notice of IEP Meeting 5/3/2021', is highlighted with a red box and a red '3.' next to it. A red box labeled '3.' points to the 'Delete' button in the rightmost column of this row.

Section Name	Last Edit	
Notice of IEP Meeting 5/3/2021	7/13/2021 3:19:21 PM by Stephanie Marullo RM	Delete
Parent Response	7/13/2021 3:19:21 PM by Stephanie Marullo RM	Delete
Second Notice		
Friendly Reminder		

3. Click **Delete**. ***NOTE: If the form has multiple sections, clicking the title page of the form will delete the entire form. To delete a specific section of a form, click the section and then click the word Delete.

Form Shortcuts

Within the IEP Meeting form, many sections will include a **Form Shortcuts** button, on the upper right of the web page. From these links, users can access necessary Supplements and other forms related to the content of the form they are working on.

Examples of Form Shortcuts:

If the user hovers over the **Form Shortcuts** link on the title page of the **Individualized Education Program Meeting Form**, the form link for the Notice of IEP Meeting will appear:

On **Section II. Determination of Eligibility** page of the **IEP Meeting Form**, the user will find links for Supplements, as well as other forms related to the content of the current form:

On **Section IV. Determination of Services** page of the **IEP Meeting Form**, the user will find links to **Accelerated Plan of Instruction**, **Physician Release from Homebound**, **Supplement: Out-of District Placement**, and **Transportation Information**:

Accessing Form Shortcuts

1. After saving current form, hover over **Form Shortcuts**.

2. Click on **Form Name**.

3. Form will open on separate tab in browser and, upon leaving the current page, the web browser will display a message reminding the user to save their form prior to transitioning to the form via the Form Shortcuts. Click **OK** to continue.

4. Click **New Draft** to load the form for editing.

5. Complete form.

6. Save form.

7. Close the window that opened with form from the Form Shortcuts by clicking on the x in the top right corner

8. If multiple web pages are open, click the SuccessEd Portal tab to transition back to the SuccessEd application.

SE Manager – IEP Meeting Types

There are 5 types of IEP Meetings within the SE application to which users have access:

1. Individualized Education Program Meeting: All sections are required.

2. Service Plan Meeting: All sections are required. ***NOTE: Only the title page is required, but all sections should be completed for annual meetings to meet legal requirements.
3. Amendment to the Individualized Education Program (IEP): Only complete sections needed.
4. Brief Individualized Education Program (IEP): Only complete sections needed.
***NOTE: The Brief is recommended for Dismissal and DNQs.
5. Transfer Individualized Education Program (IEP): Certain sections are required.
***NOTE: The program will only allow for one meeting type to be in draft at any time. Once new meetings have been locked, previous meetings can no longer be unlocked. If a meeting form has been locked without eligibilities indicated on Section II, the student's status will be automatically changed to Dismissal or DNQ.

Individualized Education Program Meeting (IEP Meeting)

The purpose of this document is to create a written statement for each child with a disability that includes a statement of the child's present levels of academic achievement and functional performance, how the child's disability affects involvement or progress in the general education curriculum or appropriate activities, a statement of measurable annual goals (academic and/or functional), how progress will be measured and when progress will be reported, a statement of special education and related services along with duration, frequency, and location of said services, supplementary aids and services, appropriate accommodations, program modifications, an explanation of the extent to which the child will be educated with non-disabled peers [ref. §300.320 (a), §1414(d)(1)(A)(i)].

***NOTE: When students are referred for a Special Education evaluation, please choose **Referral** as their status on Program Compliance and complete the necessary areas on the Notice of Evaluation and Consent for Evaluation forms. This ensures the appropriate information flows to the SPP Indicator 11 and/or 12 reports and that the Full and Individual Evaluation form is titled Full Individual and Initial Evaluation. Once evaluation and IEP Meeting forms have been completed, it is recommended the evaluation forms be locked prior to locking the IEP Meeting forms.

Related Forms: Contact Log, Notice of IEP Meeting, Procedural Safeguards Log


The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a status bar with 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. A 'New/Edit Forms' dropdown menu is highlighted with a red box and labeled '1.', and it contains the option 'Individualized Education Program Meeting'. To the right of this dropdown is a 'New / Edit' button, also highlighted with a red box and labeled '2.'. Other buttons include 'Locked', 'History', 'View All Drafts', and 'Edit Student Information'.

Required Fields: Meeting Date, This is an annual IEP, Parent 1 Name

1. Choose **Individualized Education Program Meeting** from the **Student Forms** > **New/Edit Forms** dropdown.
2. Click the **New / Edit** button.

The screenshot shows the 'Individualized Education Program Meeting' form. Red boxes and numbers 3 through 14 point to specific elements: 3. Meeting Date (5/3/2021); 4. This is an annual IEP (Yes selected); 5. Explanation of Procedural Safeguards was provided (Yes selected); 6. Student information table; 7. Parent 1 Name dropdown (Stephanie Marullo); 8. Parent 2 Name dropdown; 9. Was an interpreter used to assist in conducting the meeting? (Yes selected); 10. If yes, specify language dropdown; 11. Parent/adult student waives the 5 school days written notice of the meeting and agrees to an earlier meeting (initial below) text box; 12. Deliberations text area; 13. Form Shortcuts button; 14. Save button.

3. **Meeting Date:** Enter either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box 📅.
4. **Is this an Annual IEP?:** Choose **Yes** or **No**. ***NOTE: This is a required field, if No is selected, the meeting will not be reported as an Annual IEP.
5. **Explanation of Procedural Safeguards was Provided:** Choose **Yes**, **No**, or **N/A**.
6. **Student information:** Auto-populated with the current enrollment and demographic information.
7. **Parent 1 Name:** Choose from dropdown menu or add information by **Adding Parent**. (Refer to the **SE Application General Information User Guide** for more detailed instructions).
8. **Parent 2 Name:** Choose from dropdown menu or add information by **Adding Parent**, if applicable. (Refer to the **SE Application General Information User Guide** for more detailed instructions).
9. **Was an interpreter used to assist in conducting the meeting?:** Indicate **Yes**, **No**, or Not Applicable (**N/A**).
10. **If yes, specify language:** choose language of interpreter from dropdown menu, if interpreter was used.
11. **Parent/adult student waives the 5 school days written notice of the meeting and agrees to an earlier meeting (initial below):** Parent or adult student initials in text box if 5 school days written notice was waived.
12. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right ☰ for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
13. **Form Shortcuts:** If needed, choose the **Notice of IEP Meeting** from the title page **Form Shortcuts** button.
14. Clicking **Save** will save the form and automatically scroll user back up to list of forms. Completed form will show as having Draft (1) at the top of the screen. If any of the required fields on the form have not been addressed, the form will not

save, and missing information will display with a red minus symbol  next to the field. See **validation errors above** message will display at the bottom of the web form. *****NOTE**: Users can click Next Section to save the current web form and then transition to the next section listed.




*****NOTE**: If the Parent Agrees statement displays at the bottom of each section, this is a Customization Option the district has opted to turn on.

I. Review of Evaluation Data

The purpose of this section is to review the Full and Individual Evaluation and to determine if the student has a disability and needs special education and related services [ref. §300.306 (a)(1), §89.1050(a), §1414(b)(4)(A), §300.8(a)(1), §1401 (3)(A), §300.8(a)(2)].



Required Fields: Current Date

The screenshot shows a web form titled "I. Review of Evaluation Data". It includes a "Full and Individual Evaluation" section with "Current Date" (4/25/2020) and "Next Due Date" (4/25/2023) fields. Below is an "Other Evaluations" section with an "Add Record" button and a table with columns for "Name", "Current Date", and "Needed By". A section titled "Information for this meeting has been provided by the following:" contains checkboxes for "Parent(s)", "School personnel", "Language Proficiency Assessment Committee", "Student", "Previous school district", and "Other agencies/professionals". A "Deliberations" section features a rich text editor. On the right side, there are buttons for "Save" and "Next Section", and a "Form Shortcuts" button at the top right.

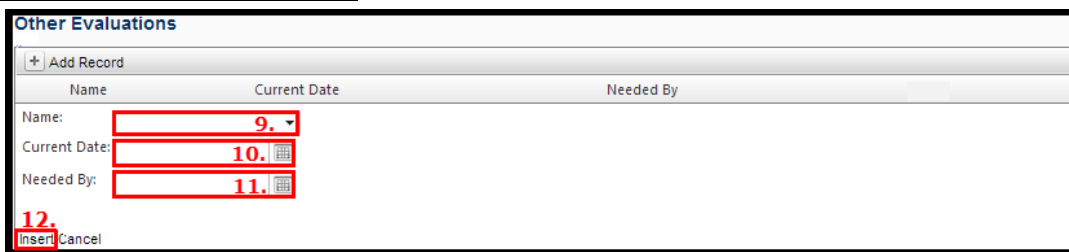
1. Choose **Current Date**, either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box .
2. **Next Due Date**: Enter either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box .
3. **Other Evaluations**: Enter name(s) of evaluation(s) by clicking on  next to **Add Record**. (Click [Adding Evaluations](#) for more detailed instructions).

*****NOTE**: This grid has two purposes. The first purpose is to document the current evaluation dates of all of the eligibilities and services a student is receiving. Every area covered in the IEP could be documented here (e.g., Behavior Intervention Plan, Counseling, Speech and Language, OT, PT, Autism, etc.). The second purpose is to populate the **Other Evaluations Report** which will serve as the communicator for each area listed to know when they have an evaluation "Needed By". This date could be a special IEP meeting request for an evaluation or participation in the FIE reevaluation.



4. **Information for this meeting has been provided by the following**: Check all that apply.

5. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right  for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
6. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved. If any of the required fields on the form have not been addressed, the form will not save, and missing information will display with a red minus symbol  next to the field. **See validation errors above** message will display at the bottom of the web form.
7. Click **Next Section** to transition to **Section II. Determination of Eligibility**.
8. **Form Shortcuts:** Choose the **Supplement: LPAC, Eligibility: Transportation, REED, or Child Outcome Summary** from the **Section I. Review of Evaluation Data Form Shortcuts** button.

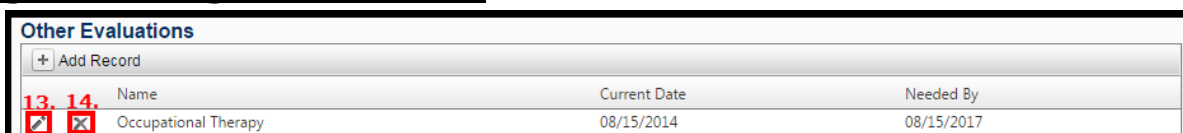
Adding Other Evaluations





The screenshot shows a form titled "Other Evaluations" with an "Add Record" button. Below it are three input fields: "Name" with a dropdown menu showing "9.", "Current Date" with a text box showing "10." and a calendar icon, and "Needed By" with a text box showing "11." and a calendar icon. At the bottom left, there is a red box around the "Insert" button and a "Cancel" button.

9. **Name:** Choose evaluation from dropdown menu. *****NOTE:** This list can be customized by the district.
10. **Current Date:** Enter either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box .
11. **Needed By:** Enter date, either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box .
12. Click **Insert**. The new evaluation will appear in the **Other Evaluations** data grid. *****NOTE:** Districts may utilize this grid to note Dismissals from an area and/or DNQ. Those areas would need to be added to the shared list if the district wanted to use the grid for this purpose. This field can be customized via the District Admin > Lists > Edit Shared Lists > Forms.IEP.Section1 > OtherEvaluations screen.

Editing/Deleting Evaluations



The screenshot shows a data grid titled "Other Evaluations" with an "Add Record" button. The grid has three columns: "Name", "Current Date", and "Needed By". A row is highlighted with a red box, containing "Occupational Therapy", "08/15/2014", and "08/15/2017". To the left of this row, there are two icons: a pencil icon labeled "13." and a delete icon labeled "14.", both enclosed in red boxes.

13. To edit an evaluation, click on the pencil , and edit as needed. Click Update to capture change if field has been edited.
14. To delete an evaluation, click on the .

II. Determination of Eligibility

The purpose of this section is to determine if the student has a disability and needs special education and related services based on the Full and Individual [ref. §300.306 (a)(1), §89.1050(a), §1414(b)(4)(A), §300.8(a)(1), §1401 (3)(A), §300.8(a)(2)].

***NOTE: **Section II: Determination of Eligibility** must be completed (e.g., have at least a Condition 1) and saved prior to completing the schedule page in order for the Instructional Arrangement and/or Speech Count to be calculated on **Section IV: Determination of Services** screen. If a meeting form has been locked without eligibilities indicated on Section II, the student's status will be automatically changed to Dismissal or DNQ.

11. Form Shortcuts

II. Determination of Eligibility

Based on the evaluation data reviewed, the committee has determined that Lillian

1. does not meet specific Federal eligibility criteria to receive special education services.
 meets specific Federal eligibility criteria (has both a disability and educational need for special education services) based on the following conditions:

Condition 1 Condition 4
Condition 2 Condition 5
Condition 3

2.

Specific Learning Disability Type(s)
Not eligible for this condition ... 3.
 Yes No Lillian has been identified as having Dyslexia or Related Disorders

Other Health Impairment Type(s)
Not eligible for this condition ... 4.

Speech Impairment Type(s)
Not eligible for this condition ... 5.

Noncategorical Early Childhood Type(s)
Not eligible for this condition ... 6.

Indicators
 Medically Fragile Multiple Disabilities 7.

A child must not be determined to be a child with a disability if the determinant factor for such determination is: lack of appropriate instruction in reading, including in the essential components of reading instruction as defined in the Elementary and Secondary Education Act (ESEA); essential components of reading instruction means explicit and systematic instruction in: phonemic awareness, phonics, vocabulary development, reading fluency, including oral reading skills, and reading comprehension strategies; lack of appropriate instruction in math; or limited English proficiency.

Deliberations
8. ...

9. Save

10. Next Section

III. Present Levels of Academic Achievement and Functional Performance

1. Program will automatically move the radio to does not meet or meets based on whether or not Conditions have been added or removed.
2. **Conditions**: If student meets specific Federal eligibility criteria, choose the **Condition(s)** which qualify student from dropdown menu(s).
3. **Specific Learning Disability Type(s)**: Select impairment type by clicking on shared list to the right ... for options. Click Yes or No to indicate whether or not student has been identified as having Dyslexia or Related Disorders. If Yes is clicked, the program will display the **Dyslexia Services Codes** section at the top of Section IV. ***NOTE: This is a district form customization which can be turned on or off through the District Admin > Form Customizations tab.
4. **Other Health Impairment Type(s)**: Select impairment type by clicking on shared list to the right ... for options. ***NOTE: This is a district form customization which can be turned on or off through the District Admin > Form Customizations tab.

5. **Speech Impairment Type(s)**: Select impairment type by clicking on shared list to the right [...] for options. ***NOTE: This is a district form customization which can be turned on or off through the District Admin > Form Customizations tab.
6. **Noncategorical Early Childhood Type(s)**: Select Noncategorical type by clicking on shared list to the right [...] for options. ***NOTE: This is a district form customization which can be turned on or off through the District Admin > Form Customizations tab.
7. **Indicator(s)**: Choose if applicable. ***NOTE: Both items are PEIMS 163 data elements. If selected, items will also pull into the Indicators by Student report.
8. **Deliberations**: Enter manually by typing into box or by clicking on shared list to the right [...] for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
9. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
10. Click **Next Section** to transition to **Section III. Present Levels of Academic Achievement and Functional Performance**.
11. **Form Shortcuts**: Choose the **Supplement: AU, Supplement: Med Fragile, Supplement: VI, Receipt of TSBVI Info, Receipt of TSD Info, DB Census Release, or Notice of Decision: Prior Written Notice** from the **Section II. Determination of Eligibility Form Shortcuts** button.

III. Present Levels of Academic Achievement and Functional Performance

The purpose of this section is to create a written statement for each child with a disability that includes a statement of the child’s present levels of academic achievement and functional performance, how the child’s disability affects involvement or progress in the general education curriculum or appropriate activities, discussion of transition services, and development of appropriate measurable postsecondary goals [ref. §300.320 (a)(1), §1414(d)(1)(A)(i)(I), §300.320(a)(1)(i), §300.320(a)(1)(ii), §300.320(b)(1), §1414(d)(1)(A)(i)(VII)(aa)].

Disability Impact Statement

III. Present Levels of Academic Achievement and Functional Performance Form Shortcuts

Import PLAAFP data from SE FIE Import PLAAFP section strengths and needs from the most recently locked Full and Individual Evaluation form in SE FIE.
 Import PLAAFP data from SE IEP Goals 1.

Disability Impact Statement:
 Based on the PLAAFP statement(s) below, the IEP Committee has determined Adelaide's disability significantly affects her involvement and progress in the general education curriculum. For preschool children, as appropriate, indicate how the disability affects participation in appropriate activities.

English Math Science Social Studies Electives Physical Education Other

PLAAFPs must include a description of how the disability impacts the student's access and progress in the general curriculum. 2.

[Rich text editor area]

1. **Import PLAAFP data from SE FIE or Import PLAAFP from SE IEP Goals:**
Clicking the button will populate this section of the IEP Meeting with the corresponding PLAAFP data from the last locked FIE or from the draft Present Levels of Academic Achievement and Functional Performance form from SE IEP Goals. Upon clicking the Import PLAAFP from SE IEP Goals button, information in form will be added to the data in the Physical, Behavioral, Functional and Academic text fields. ***NOTE: Multiple PLAAFP forms can be completed. Information imported into this section will not replace the information already typed into the text box. District Admins can decide if this form should be locked once the IEP Meeting has been held or if it is to be deleted once the information has been imported into the IEP Meeting form.
2. **Disability Impact Statement:** Check all areas in which the student’s disability affects his/her involvement and progress in the general education curriculum based on the PLAAFP statement. (English is considered to be ELAR across the programs.) Enter by clicking on shared list to the right [...] for options, or by typing into box if desired option is not available in shared list. Options selected in shared list will overwrite text in box. ***NOTE: Statements in shared list can be customized by the district.

Physical

The screenshot shows the 'Physical' section of an IEP form. At the top, there is a text area with a shared list icon (three dots) on the right, labeled '3.'. Below the text area are three radio button options: 'Personal Care Services' (labeled '4.'), 'Nursing' (labeled '5.'), and 'Assistive Technology' (labeled '6.'). Each option has 'Yes' and 'No' radio buttons.

3. **Physical:** Enter by clicking on shared list to the right [...] for options, or by typing into box if desired option is not available in shared list. Options selected in shared list will overwrite text in box. ***NOTE: Statements in shared list can be customized by the district.
4. **Personal Care Services:** Choose **Yes** if the student is in need of personal care services or **No** if he/she is not. ***NOTE: If selected, Yes/No will pull into the Indicators by Student report.
5. **Nursing:** Choose **Yes** if the student is in need of nursing or **No** if he/she is not. ***NOTE: If selected, Yes/No will pull into the Indicators by Student report.
6. **Assistive Technology:** Choose **Yes** if the student is in need of assistive technology or **No** if he/she is not. ***NOTE: Assistive Technology is a PEIMS 163 data element. If selected, Yes/No will pull into the Indicators by Student report.

Behavioral

Behavioral

7.

Documentation has been submitted and Adelaide is in need of a behavior intervention plan.

Yes No

8.

- 7. Behavioral:** Enter by clicking on shared list to the right [...] for options, or by typing into box if desired option is not available in shared list. Options selected in shared list will overwrite text in box. ***NOTE: Statements in shared list can be customized by the district.
- 8. Behavior Intervention Plan:** Click Yes or No if documentation has been submitted to indicate student is in need of a Behavior Intervention Plan. ***NOTE: If selected, Yes/No will pull into the Indicators by Student report.

Discipline

Discipline

9.

- 9. Discipline:** Enter by clicking on shared list to the right [...] for options, or by typing into box if desired option is not available in shared list. Options selected in shared list will overwrite text in box. ***NOTE: Statements in shared list can be customized by the district.


Functional

Functional

10.

10. **Functional:** Enter by clicking on shared list to the right for options, or by typing into box if desired option is not available in shared list. Options selected in shared list will overwrite text in box. ***NOTE: Statements in shared list can be customized by the district.

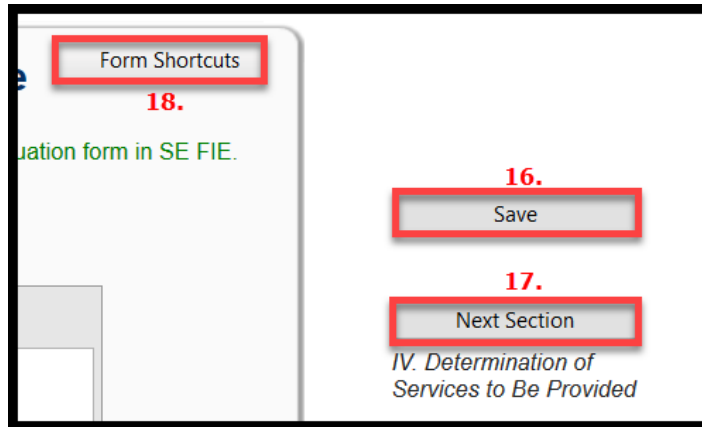
Academic



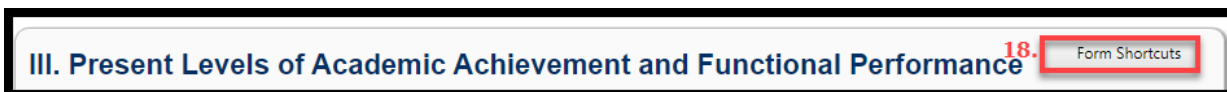
11. **Academic:** Enter by clicking on shared list to the right for options, or by typing into box if desired option is not available in shared list. Options selected in shared list will overwrite text in box. ***NOTE: Statements in shared list can be customized by the district.



12. **Student Age:** Auto-populated from enrollment information.
13. **Transition Planning:** Choose appropriate transition statement for student.
14. **Initial Transition Services Discussion Date:** Enter date in which transition services were initially discussed.
15. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.



16. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
17. Click **Next Section** to transition to **Section IV. Determination of Services to Be Provided**.



18. **Form Shortcuts**: Choose the **Administrative Discipline Plan, Graduation Plan, Behavior Intervention Plan, Functional Behavior Review, Incident Report: Restraint, Time Out or Other, Supplement: Assistive Technology, Supplement: Failure Review, Supplement: Graduation, Supplement: Manifestation Determination Review, Supplement: Personal Care Services, or Supplement: Transition** from the **Section III. PLAAFP Form Shortcuts** button.

IV. Determination of Services to Be Provided

The purpose of this section is to determine the specially designed instruction as found only in special education, the location of such services, supplementary aids and services, and the frequency, duration, and time of such services [ref. §300.320(a)(4), §1414(d)(1)(A)(i)(IV), §300.320(a)(4), §300.39(a), §1401(29), §89.150(a)(1), §89.1090, §300.320(a)(7), §1414(d)(1)(A)(i)(VII), TEC 25.0343(a), TEC 25.0343(c), TEC 25.0343(A)(1), TEC 25.0343(A)(2), TEC 25.0343(d), TEC 25.0343(d)].

Required Fields: Schedule, Services Start Date

1. **Schedule: Current** will automatically display from the dropdown. *****NOTE:** The Current schedule must always be the schedule closest to the date of the meeting (i.e., the first schedule to be implemented per the creation of a PEIMS record).
2. **Academic Year:** The Current Academic Year will automatically display in the Academic Year field.

3. **Services Start Date:** The Services Start Date will automatically populate based on the date entered as the IEP Meeting Date on the title page of the IEP Meeting form. If this date needs to be changed, click in the field and enter the date services begin, either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box 📅.
4. **Duration of Services:** The Duration of Services date will automatically populate with the last day of the current school year as indicated on districts Academic Year Calendar screen.
5. **Campus Assignment:** The Campus Assignment will automatically populate based on the Current Campus on the Students Enrollment screen. If changes need to be made, choose Campus from the dropdown menu.

6. **Program Name:** Choose from dropdown menu. List can be customized by district. ***NOTE: The program name populates fields in the Student Campuses, Grades, and Program Names report. The report is a resource for planning for the current year and next year.
7. **District of RDSPD:** Choose from dropdown menu, if applicable. ***NOTE: 1) This field will display on the schedule page if the student has Deaf or Hard of Hearing or Deaf-Blindness selected as a condition on Section II of the IEP Meeting form. 2) This field should be populated with the County ID number for the district providing those services. The field can be customized via the District Admin > Lists > Edit Shared Lists > Forms.IEP.Section4 > DistrictOfRDSPD screen.
8. **ECSE Location:** Choose from dropdown menu, if applicable. ***NOTE: This field will display if student is aged 3 – 5 years old not yet enrolled in KG.
9. **Dyslexia Services Code:** Choose the appropriate Dyslexia Services Code from the shared list box on the right.
10. **Interpreting Service Type:** Choose from dropdown menu, if applicable.

Instructional Schedule

***NOTE: When the students Section IV. Determination of Services to be Provided page is printed, the students calculated Instructional Time will pull into the printed form.


The screenshot shows the 'Instructional Schedule' form with the following fields and callouts:

- 1. Plus sign (+) next to 'Add new record' button.
- 2. Subject dropdown menu.
- 3. Semester dropdown menu (set to 'Spring').
- 4. Service Provider dropdown menu.
- 5. Grade Assigned By dropdown menu.
- 6. Min. Gen input field (set to 0).
- 7. Min. SpEd input field (set to 0).
- 8. Frequency input field (set to 1).
- 9. Duration dropdown menu (set to 'day').
- 10. Service Type dropdown menu (set to 'Direct').
- 11. RDSPD checkbox.
- 12. Removed From dropdown menu.
- 13. Comments text area.
- 14. 'Insert' and 'Cancel' buttons.
- 15. Checkbox for 'Calculate Anderson's instructional arrangement based on a commensurate day schedule.' (unchecked).
- 16. Radio buttons for 'Anderson's school day is commensurate with peers at the same grade level' (set to 'No').


1. To add a new subject to **Instructional Schedule**, click on plus **+** next to **Add new record**.
2. **Subject**: Choose from dropdown menu. Subjects selected from this dropdown will pull into the Class List by Subject report. *****NOTE**: Subject list can be customized by the district. Speech Therapy must be selected from the list in order to trigger the Speech Count for PEIMS. Any subject not selected from the dropdown, is not reportable. District Admins have the ability to lock down this list so staff can only select options available from the dropdown.
3. **Semester**: Choose from dropdown menu.
4. **Service Provider**: Choose from dropdown menu. *****NOTE**: Service Provider list can be customized by the district.
5. **Grade Assigned By**: Choose from dropdown menu. *****NOTE**: Not Applicable is an option for classes that do not receive grades (e.g., Speech Therapy).
6. **Min. Gen**: Enter minutes to be provided by general education staff. *****NOTE**: If the district has enabled the commensurate day through the District Admin > Form Customizations tab, minutes in general education may not be necessary.
7. **Min. SpEd**: Enter minutes to be provided by special education staff.
8. **Frequency**: Enter frequency of service. (For example, speech services that occur once a week would have a **Frequency: 1** and the **Duration: week**.)
9. **Duration**: Choose how often service occurs. (For example, speech services that occur once a week would have a **Frequency: 1** and the **Duration: week**.)
10. **Service Type**: Choose from dropdown menu.

- a. **Direct:** Direct instruction is instruction provided directly to the student by a special education teacher or related services professional in a special education setting. (e.g., Resource pull out class).
 - b. **Consult/Indirect:** Consult/Indirect are not provided directly to the student. The special education teacher or related services professional provides the service to others who are working directly with the student.
 - c. **In-Class Support:** In-Class Support is support provided inside the general education classroom by a special education staff member.
 - d. **Co-Teaching:** Co-Teaching is the practice of pairing general education and special education teachers or related services professionals together in a classroom. Staff will share the responsibilities of planning, teaching, and assessing the student.
 - e. **Out of School:** Out of School are services provided outside of the school day.
11. **RDSPD:** Regional Day School Program for the Deaf; check box if applicable.
 12. **Removed From:** Choose from dropdown menu. *****NOTE:** The **Removed From** field is utilized when a **direct** special education service is provided less than daily (e.g., Speech Therapy, AI, VI, Content Mastery). If the **Service Type** is anything other than Direct, do not use the **Removed From** field.
 13. **Comments:** Type any additional comments into text box.
 14. Click **Insert** when complete or **Cancel** to cancel the function.
 15. **Calculate [Student's] instructional arrangement based on a commensurate schedule:** If the district opts to only enter special education minutes into a student's instructional schedule, clicking the box will allow the program to automatically calculate the students Instructional Arrangement without having to enter in each General Education subject. *****NOTE:** This is a district form customization which can be turned on or off through the District Admin > Form Customizations tab. See **SE Admin User Guide** for more information.
 16. **[Student's] school day is commensurate with peers at the same grade level:** If no is selected, explain the reason(s) why the student's day is not commensurate in the Deliberations text field.

Instructional Accommodations and/or Modifications

1. Click the plus  next to **Add New Record**.
2. **Instructional Accommodations and/or Modifications**: Choose from dropdown menu or enter into box. Accommodations selected from this dropdown and typed into the field will pull into the Student Accommodations and Modifications report. *****NOTE**: Instructional Accommodations and/or Modifications list can be customized by the district.
3. **Subjects**: Check all subjects where accommodation should be used.
4. **Comments**: Enter any additional information into text box.
5. Click **Insert** when complete or **Cancel** to cancel the function.


Related Services

1. Click the plus  next to **Add New Record**.
2. **Related Service**: Choose from dropdown menu. Related Services selected from this dropdown will pull into the Related Services by Services report. *****NOTE**: Related Services list can be customized by the district. District Admins have the ability to lock down this list so staff can only select options available from the dropdown.
3. **Semester**: Choose from dropdown menu.

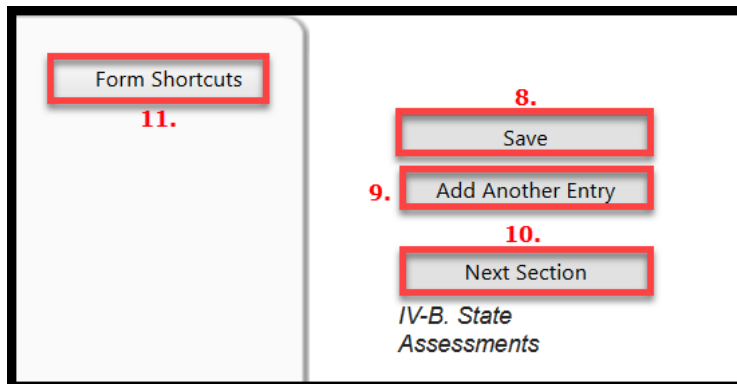
4. **Service Provider:** Choose from dropdown menu.
5. **Minutes:** Enter into text box.
6. **Frequency:** Enter into text box (default is **1**).
7. **Duration:** Enter into text box (default is **day**).
8. **Service Type:** Choose from dropdown menu. ***NOTE: For services provided outside of the school day, use Out of School (e.g., Transportation, In-Home/Parent Training).
 - a. **Direct:** Direct instruction is instruction provided directly to the student by a special education teacher or related services professional in a special education setting. (e.g., Resource pull-out class).
 - b. **Consult/Indirect:** Consult/Indirect are not provided directly to the student. The special education teacher or related services professional provides the service to others who are working directly with the student.
 - c. **In-Class Support:** In-Class Support is support provided inside the general education classroom by a special education staff member.
 - d. **Co-Teaching:** Co-Teaching is the practice of pairing general education and special education teachers or related services professionals together in a classroom. Staff will share the responsibilities of planning, teaching, and assessing the student.
 - e. **Out of School:** Out of School are services provided outside of the school day
9. **Removed From:** Choose from dropdown menu. ***NOTE: The **Removed From** field is utilized when a direct special education service is provided less than daily (e.g., Occupational Therapy, Physical Therapy, Counseling, etc.). If the **Service Type** is anything other than Direct, do not use the **Removed From** field.
10. **Comments:** Enter into text box.
11. Click **Insert** when complete or **Cancel** to cancel the function.

Supplementary Aids and Services

1. Click the plus **+** next to **Add New Record**.
2. **Type:** Choose from dropdown menu. ***NOTE: Type list can be customized by the district.
3. **Aid/Service to be provided:** Choose from dropdown menu or manually type information into field. ***NOTE: Aid/Service list can be customized by the district.
4. Click **Insert** when complete or **Cancel** to cancel the function.

1. **This is the campus which [the student] would attend if not in special education:** Choose **Yes** or **No**.
2. **This is the campus that is as close as possible to [the student's] home which provides the services the IEP committee has deemed necessary:** Choose **Yes** or **No**.
3. **[Student's] home campus is:** Choose from dropdown menu.
4. **If no was selected above, provide reason:** Choose from dropdown menu or manually enter information into field.
5. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right  for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
6. **Fall Instructional Arrangement Override:** Select when appropriate. Percentage-based IAs are auto-calculated, along with the speech count as appropriate. TEA's Student Attendance Accounting Handbook is an excellent resource for questions regarding instructional arrangements: [Click here to access the 2025-26 SAAH](#). *****NOTE:** The override should only be utilized for IAs that cannot be calculated such as Home-based Instruction, Homebound, Hospital Class, Nonpublic Day School, Off Home Campus, Other Environment, Residential Nonpublic School Program, State Supported Living Centers, Texas School for the Blind and Visually Impaired, Texas School for the Deaf and Vocational Adjustment Class/Program. The system is calculating the IA based on guidance from the Student Attendance Accounting Handbook and minutes entered int Section IV. Determination of Services to Be Provided.
7. **Spring Instructional Arrangement Override:** Select when appropriate. Percentage-based IAs are auto-calculated, along with the speech count as appropriate. TEA's Student Attendance Accounting Handbook is an excellent resource for questions regarding instructional arrangements: [Click here to access the 2025-26 SAAH](#). *****NOTE:** The override should only be utilized for IAs that cannot be calculated such as Home-based Instruction, Homebound, Hospital Class, Nonpublic Day School, Off Home Campus, Other Environment, Residential

Nonpublic School Program, State Supported Living Centers, Texas School for the Blind and Visually Impaired, Texas School for the Deaf and Vocational Adjustment Class/Program. The system is calculating the IA based on guidance from the Student Attendance Accounting Handbook and minutes entered in Section IV. Determination of Services to Be Provided.



8. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved. If any of the required fields on the form have not been addressed, the form will not save, and missing information will display with a red minus symbol **⊖** next to the field. **See validation errors above** message will display at the bottom of the web form.
9. Click **Add Another Entry** to add an additional schedule.
10. Click **Next Section** to transition to **Section IV-B. State Assessment (Current)**.
11. **Form Shortcuts**: Choose the **Accelerated Plan of Instruction, Physician Release from Homebound, Supplement: Out-of-District Placement,** or **Transportation Information** from the **Section IV. Determination of Services to Be Provided Form Shortcuts** button.

Creating Next Schedule

Users can enter up to three instructional schedules within the IEP Meeting form.



1. To enter the schedule for Next year, click **Save** on Current schedule page and, once program scrolls back up to the top, click on green plus sign **+** next to **IV. Determination of Services to be Provided** in form list to start the new schedule.

The screenshot shows the 'IV. Determination of Services to Be Provided' form. At the top right is a 'Form Shortcuts' button. Below it, a note says 'Up to 3 entries can be included in this section'. A green message reads 'Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.' Below this are five input fields: 'Schedule' (dropdown menu with 'Next' selected, labeled '2.'), 'Academic Year' (dropdown menu with '2020-21' selected, labeled '3.'), 'Services Start Date' (calendar icon with '8/25/2020' selected, labeled '4.'), 'Duration of Services' (calendar icon with '12/8/2020' selected, labeled '5.'), and 'Campus Assignment' (dropdown menu with 'Marullo Intermediate' selected, labeled '6.').

2. **Schedule: Next** will automatically display from the dropdown.

3. **Academic Year:** The Next Academic Year will automatically display in the Academic Year field.
4. **Services Start Date:** The Services Start Date will automatically populate based on the first day of school for the next school year based on the date entered into the districts Academic Year Calendar screen. If this date needs to be changed, click in the field and enter the date services begin, either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box 📅.
5. **Duration of Services:** The Duration of Services date will automatically populate as one year out from the student Annual IEP Due Date.
6. **Campus Assignment:** The Campus Assignment will automatically populate based on the Current Campus on the Students Enrollment screen. If changes need to be made, choose Campus from the dropdown menu.

The screenshot shows a web form with the following fields and annotations:


- Program Name:** A dropdown menu with "-- Select --" and a red box labeled "7." next to it.
- District of RDSPD:** A dropdown menu with a red box labeled "8." next to it.
- ECSE Location:** A dropdown menu with "... 9." next to it.
- Dyslexia Services Code:** A text input field with a red box labeled "10." and a calendar icon on the right.
- For Deaf/Hard of Hearing, select PEIMS Predominant Interpreting Service Type:** A dropdown menu with a red box labeled "11." next to it.

7. Enter/edit **Program Name** as needed.
8. Enter/edit **District of RDSPD** as needed.
9. Enter/edit **ECSE Location** code as needed.
10. Enter/edit **Dyslexia Services Code** as needed.
11. Enter/edit **Interpreting Service Type** as needed.

The screenshot shows a button menu with the following options:

- Save**
- Add Another Entry**
- Next Section**

Below the buttons is the text: *IV-B. State Assessments*

12. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved. If any of the required fields on the form have not been addressed, the form will not save, and missing information will display with a red minus symbol  next to the field. **See validation errors above** message will display at the bottom of the web form.

Creating an Alternate Schedule

*****NOTE:** If an Alternate schedule is created for a student, the information entered does not trigger a PEIMS event. The date range on an Alternate schedule must be set between the start of the current school year and the end date of the next schedule.

III. Present Levels of Academic Achievement and Functional Performance	8/13/2020 4:42:25 PM by Stephanie RM Marullo	Delete
IV. Determination of Services to Be Provided *		
2019-20, Services Start: 5/1/2020 (-/41-0)	8/13/2020 4:42:25 PM by Stephanie RM Marullo	Delete
2020-21, Services Start: 8/25/2020 (41-0/41-0)	8/13/2020 4:42:25 PM by Stephanie RM Marullo	Delete

1. To enter an Alternate schedule, click **Save** on Next schedule page and, once program scrolls back up to the top, click on green plus sign **+** next to **IV. Determination of Services to be Provided** in form list to start the alternate schedule.

IV. Determination of Services to Be Provided

Up to 3 entries can be included in this section

Form Shortcuts

Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.

Schedule **2.** Academic Year **3.** Services Start Date **4.** Duration of Services **5.** Campus Assignment **6.**

Alternate Marullo Elementary Sc

No PEIMS 163 Record will be created.

Program Name **7.** ECSE Location

-- Select --

2. **Schedule: Alternate** will automatically display from the dropdown.
3. **Academic Year:** Select Academic Year from the dropdown.
4. **Services Start Date:** Enter the Services Start Date for the Alternate schedule. Services Start Date should be after the Current schedule Services Start Date.
5. **Duration of Services:** Once an Academic Year is selected, the Duration of Services date will automatically populate as one year out from the student Annual IEP Due Date.
6. **Campus Assignment:** The Campus Assignment will automatically populate based on the Current Campus on the Students Enrollment screen. If changes need to be made, choose Campus from the dropdown menu.
7. Enter/edit **Program Name** as needed.

***NOTE: 1) Complete the rest of schedule following the same steps as the Current or Next schedule. 2) The Alternate schedule will not create a PEIMS 163 Record so any changes to PEIMS would need to be manually entered into Program Compliance with the actual start date, which may be different than the date on the form if explained or documented in the deliberations.

INSTRUCTIONAL ARRANGEMENT/SPEECH COUNT NOTES

Click [here](#) to refer to the **Student Attendance Accounting Handbook** for additional IA and Speech Count information.

1. **Section II: Determination of Eligibility** must be completed (e.g., have at least a Condition 1) and saved prior to completing the schedule page in order for the IA and/or SC to be calculated on **Section IV: Determination of Services to Be Provided** screen. See [Section 2 Warning Message](#), below.
2. IA/SC are not determined by a student's disability; instead, they are determined by the % of special education time scheduled for a student. Other IAs are determined

by the setting (e.g., Homebound, VAC, etc.) selected from the Instructional Arrangement Override.

3. Students receiving Speech Therapy as their only instructional service have an IA/SC of 00-24, even if he/she is receiving a related service. For the speech count to calculate, "Speech Therapy" must appear be selected from the Subject dropdown under Instructional Services. The application does not recognize any change to the words "Speech Therapy". For example, "speech therapy" (no caps) would not calculate a speech count.
4. It is conceivable for a student to be a 00-24 even if he/she does not have a primary condition of Speech Impairment (e.g., a student with Autism and Speech Impairment).
 - Per the Student Attendance Accounting Handbook (page 99):

"A student who is receiving speech therapy services and is **not** receiving instructional services through any other instructional setting (for example, the resource room) should have an instructional setting code of 00 reported on the TSDS PEIMS 42408 record. Code 00 is used regardless of whether the student receives only speech therapy or receives speech therapy as well as one or more other special education related services (that is, supportive services that do not constitute instructional services, such as occupational therapy or physical therapy). Also, code 00 is used regardless of whether the speech therapy is provided in the general education classroom or in a location other than a general education setting. A student whose instructional setting code is reported as 00 on the TSDS PEIMS 42408 record must have a speech therapy indicator code of 1."
5. When calculating IA/SC: All students who have a Condition 1 will start with an IA of 40-0 when a schedule page is put in draft (the assumption: there is an educational need for special education services, Mainstream being the least restrictive). If Speech Therapy is entered as a subject and there is no other instructional time in the special education column, the IA/SC will automatically calculate to a 00-24 and stay that way unless "special education and related services provided in a general education classroom on a regularly scheduled basis are added" (SAAH, page 107). This is true regardless of the disability.
 - Per the Student Attendance Accounting Handbook (page 108)

"The instructional setting code 40 is used for a student who is provided special education and related services in the general education classroom in accordance with the student's IEP. The term special education means specially designed instruction, at no cost to parents, to meet the unique needs of a child with a disability. Specially designed instruction means content, methodology, or delivery of instruction that has been adapted, as appropriate to the needs of an eligible child, to:

 - address the unique needs that result from the child's disability and
 - ensure access of the child to the general curriculum.

Examples of special education and related services provided to a student in the general education instructional setting include, but are not limited to, direct instruction, helping teacher, team teaching, co-teaching, interpreter, education aides, curricular or instructional modifications or accommodations, special materials or equipment, consultation with the student and his or her general classroom teacher(s), staff development, and reduction of ratio of students to instructional staff members”.

6. Speech Therapy Indicator Codes (SC):

- **Indicator Code 23** means the student receives no Speech Therapy.
- **Indicator Code 24** means the student receives only Speech Therapy as an instructional service.
- **Indicator Code 25** means the student receives Speech Therapy along with a service through another special education instructional setting. Again, there is no tie to the type(s) of disability a student may be eligible for or the order of disability (1-5). SC is strictly determined by the subject of “Speech Therapy” on the schedule page, nothing else.

Section 2 Warning Message

If the Determination of Eligibility section does not have at least one condition chosen, the user will see this warning message under the Instructional Schedule, once the page is opened:

IV. Determination of Services to Be Provided Form Shortcuts

Up to 3 entries can be included in this section

Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.

Schedule: Current | Academic Year: 2020-21 | Services Start Date: 8/28/2020 | Duration of Services: 5/28/2021 | Campus Assignment: Marullo Intermediate

Program Name: -- Select --

Instructional Schedule

Subject	Semester	Service Provider	Grade Assigned By	Min. Gen	Min. SpEd	Freq. / Duration	Service Type	RDSPD
No records to display.								

Marullo Intermediate School Instructional Time: 400 | Adelaide's Instructional Time: 0 | Adelaide's Percentage Special Education Time: 0

PEIMS Notification: No condition(s) have been saved on Section II. Determination of Eligibility. The Instructional Arrangement will not calculate correctly. If a DNQ or Dismissal, ignore this message and leave Section IV blank. Save will be allowed.

Return to **II. Determination of Eligibility** and choose appropriate conditions (see screenshot below).

II. Determination of Eligibility Form Shortcuts

Based on the evaluation data reviewed, the committee has determined that Lillian

does not meet specific Federal eligibility criteria to receive special education services.

meets specific Federal eligibility criteria (has both a disability and educational need for special education services) based on the following conditions:

Condition 1: [Dropdown] | Condition 4: [Dropdown]

Condition 2: [Dropdown] | Condition 5: [Dropdown]

Condition 3: [Dropdown]

Schedule Page Warning Messages

IV. Determination of Services to Be Provided

Up to 3 entries can be included in this section

Form Shortcuts

Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.

Schedule	Academic Year	Services Start Date	Duration of Services	Campus Assignment
Current	2020-21	8/28/2020	5/28/2021	Marullo Intermediate

Services Start Date is more than 10 days from the Meeting Date.

There is a warning if the Services Start Date is more than 10 days from the Meeting Date. The user can continue completing the form and will still be able to save with this message. This change is intended to catch typographical date errors such as 8-28-2200.

This form cannot be saved.

- Unable to save this schedule page. The Services Start Date cannot be greater than the Duration of Services date.
- The 2020-21 Academic Year requires the Services Start Date to occur between 7/20/2020 and 5/28/2021. Please select the appropriate Academic Year and Services Start Date.

IV. Determination of Services to Be Provided

Up to 3 entries can be included in this section

Form Shortcuts

Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.

Schedule	Academic Year	Services Start Date	Duration of Services	Campus Assignment
Current	2020-21	8/12/2021	5/28/2021	Marullo Intermediate

Services Start Date is more than 10 days from the Meeting Date.

Services Start Date does not occur during the selected Academic Year.

For Current Year:

- Services Start Date cannot be greater than the Duration of Services.
- Duration of Services cannot be greater than the Last day of this school year.
- Duration of Services cannot be less than then IEP Meeting Date.

This form cannot be saved.

- Unable to save this schedule page. The Services Start Date cannot be greater than the Duration of Services date.
- Unable to save this schedule page. The Duration of Services date cannot be greater than 1 year from the Meeting Date.
- Unable to save this schedule page. The Duration of Services date is more than one year after the date of the IEP Meeting. Your IEP must not exceed 1 calendar year. Please verify your date selection. If this IEP Meeting is being conducted before the first day of school, you may not be able to complete a Next Year schedule for this reason.
- The 2021-22 Academic Year requires the Services Start Date to occur between 8/23/2021 and 5/28/2022. Please select the appropriate Academic Year and Services Start Date.

IV. Determination of Services to Be Provided

Up to 3 entries can be included in this section

Form Shortcuts

Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.

Schedule	Academic Year	Services Start Date	Duration of Services	Campus Assignment
Next	2021-22	8/23/2022	9/3/2021	Marullo Intermediate

Services Start Date does not occur during the selected Academic Year.

For Next Year:

- Services Start Date cannot be less than the Beginning of next school year.
- Services Start Date cannot be greater than the Duration of Services.
- Duration of Services cannot be greater than the IEP Meeting Date + 1 Year.
- Duration of Services cannot be less than the Beginning of next school year.

For Current and Next Year:

Instructional Schedule									
+ Add new record Refresh									
	Subject	Semester	Service Provider	Grade Assigned By	Min. Gen	Min. SpEd	Freq. / Duration	Service Type	RDSPD
>	Speech Therapy	Both	Special Education Teacher	Special Education	0	30	5 / 6 wks (G)	Direct	<input type="checkbox"/>
>	Reading	Both	Special Education Teacher	Special Education	0	45	1 / day	In-Class Support	<input type="checkbox"/>
+ Add new record Refresh									
Instructional Time: 400 Adelaide's Instructional Time: 0 Adelaide's Percentage Special Education Time: 0.00% Instructional Arrangement: 40 - Mainstream Speech Count: 2 PEIMS Warning: The Related Service Occupational Therapy is missing a selection in the Removed From field. The Instructional Arrangement will not calculate correctly until this is resolved. Save will be allowed. Lock will be prevented.									

- A PEIMS Warning message will display if the user has entered in a Direct service without indicating the Removed From field. The user will be directed to the specific Related Service needing to be corrected within the message.

ECSE Location Codes

Click [here](#) to access the PPCD Service Location Code Decision Tree and the Interactive Coding Decision Tree.

0 = Not applicable to this student (i.e. students who do not meet ECSE reporting requirement).

1 = (A1) ECSE child participates in a regular early childhood program at least 10 hours per week, and receives the majority of his/her special education services in the regular early childhood education program. The program is designed for typically developing children ages 3-5 and is not specifically or primarily designed for children with disabilities which includes (at the time of the placement decision) a majority of at least 50 percent of nondisabled children (i.e., children without an individualized education program (IEP)).

The location of the program may include, but is not limited to: (a) Community-Based Preschool (3- Through 5-Year-Olds), (b) District or Community Child Care Programs, (c) Head Start Programs, (d) Kindergarten Programs, (e) Prekindergarten Programs, or (f) School-Based Preschool, Staff and/or Community Access (3- Through 5-Year-Olds).

3 = (C1, C2, C3) ECSE child participates in a special education program and receives the majority of his/her special education services in a program that is specifically or primarily designed for children with disabilities and includes (at the time of the placement decision) a majority of at least 50 percent of disabled children (i.e., children with an individualized education program (IEP)).

4 = (B1) ECSE child participates in a regular early childhood program less than 10 hours per week, and receives the majority of his/her special education services in the regular early childhood education program. The program is designed for typically developing children ages 3-5 and is not specifically or primarily designed for children with disabilities which includes (at the time of the placement decision) a majority of at least 50 percent of nondisabled children (i.e., children without an individualized education program (IEP)).

The location of the program may include, but is not limited to: (a) Community-Based Preschool (3- Through 5-Year-Olds), (b) District or Community Child Care Programs, (c) Head Start Programs, (d) Kindergarten Programs, (e) Prekindergarten Programs, or (f) School-Based Preschool, Staff and/or Community Access (3- Through 5-Year-Olds).

5 = (A2) ECSE child participates in a regular early childhood program at least 10 hours per week, and receives the majority of his/her special education services in another

<p>location outside of the regular early childhood program. The program is designed for typically developing children ages 3-5 and is not specifically or primarily designed for children with disabilities which includes (at the time of the placement decision) a majority of at least 50 percent of nondisabled children (i.e., children without an individualized education program (IEP)).</p> <p>The location of the program may include, but is not limited to: (a) Community-Based Preschool (3- Through 5-Year-Olds), (b) District or Community Child Care Programs, (c) Head Start Programs, (d) Kindergarten Programs, (e) Prekindergarten Programs, or (f) School-Based Preschool, Staff and/or Community Access (3- Through 5-Year-Olds).</p>
<p>6 = (B2) ECSE child participates in a regular early childhood program less than 10 hours per week, and receives the majority of his/her special education services in another location outside of the regular early childhood program. The program is designed for typically developing children ages 3-5 and is not specifically or primarily designed for children with disabilities which includes (at the time of the placement decision) a majority of at least 50 percent of nondisabled children (i.e., children without an individualized education program (IEP)).</p> <p>The location of the program may include, but is not limited to: (a) Community-Based Preschool (3- Through 5-Year-Olds), (b) District or Community Child Care Programs, (c) Head Start Programs, (d) Kindergarten Programs, (e) Prekindergarten Programs, or (f) School-Based Preschool, Staff and/or Community Access (3- Through 5-Year-Olds).</p>
<p>7 = (D1) ECSE child participates in a neither a regular education or special education program and receives the majority of his/her special education services in the principal residence of the child's family or caregiver.</p>
<p>8 = (D2) ECSE child participates in a neither a regular education or special education program and receives the majority of special education services in an service providers locations setting but does not participate in a regular early childhood program designed for typically developing children.</p> <p>The service provider location may include, but is not limited to: (a) private clinicians' offices (b) private clinicians' offices located in a school building (This child is "dropped in" to the school or another setting to receive special education services but is at home for the remainder of the school day. He/she is not attending the school except to receive speech therapy/instruction.), (c) hospital facilities on an outpatient basis.</p>

Instructional Arrangements

32	-	Center-based Instruction
45	-	Full-Time Early Childhood
31	-	Home-based Instruction
01	-	Homebound
02	-	Hospital Class
40	-	Mainstream
00	-	No Instructional Setting
60	-	Nonpublic Day School
97	-	Off Home Campus-Community Class
98	-	Off Home Campus-Full-Time Early Childhood
91	-	Off Home Campus-Mainstream
92	-	Off Home Campus-Resource (Less than 21%)
93	-	Off Home Campus-Resource Room (21-<50%)
94	-	Off Home Campus-Self-Contained (50-60%)

95	-	Off Home Campus-Self-Contained (>60%)
96	-	Off Home Campus-Separate Campus
34	-	Other Environment
87	-	Residential Care-Community Class
89	-	Residential Care-Full-Time Early Childhood
81	-	Residential Care-Mainstream
82	-	Residential Care-Resource Room (Less than 21%)
83	-	Residential Care-Resource Room (21-<50%)
84	-	Residential Care-Self-Contained (50-60%)
85	-	Residential Care-Self-Contained (>60%)
86	-	Residential Care-Separate Campus
88	-	Residential Care-Vocational Adjustment Class
50	-	Residential Nonpublic School Program
41	-	Resource Room (Less than 21%)
42	-	Resource Room (21-<50%)
43	-	Self-Contained, Mild/Moderate/Severe (50-60%)
44	-	Self-Contained, Mild/Moderate/Severe (>60%)
30	-	State Supported Living Centers
70	-	Texas School for the Blind and Visually Impaired
71	-	Texas School for the Deaf
08	-	Vocational Adjustment Class/Program

IV-B. State Assessments

The purpose of this section is to determine which State and District wide assessments the student will take as well as any necessary and/or needed accommodations [ref. §1412(a)(16)(A), §89.1055(b), §1412(a)(16)(B), §200.6(a)(1), §1412(a)(16)(C)(ii)(I), §200.6(a)(3)(i), §200.1(d)].

*****NOTE:** State assessment information entered into this page will pull into the State Assessments report once the IEP Meeting form has been locked.

State/District Assessment Decisions

IV-B. State Assessments Form Shortcuts

Up to 2 entries can be included in this section

Schedule: School Year:

State / District Assessment Decisions

State assessments for the current school year will be addressed during this IEP meeting:
 Yes No **1.**

Required Tests
 The parent has been informed that an accelerated plan of instruction is required if the student does not pass one or more assessments.
 Yes No Not Applicable **2.**

Committee Members understand all of the assessment options, including the characteristics of each assessment and the potential implications of each assessment choice.
 Yes No **3.**

1. Click **Yes** if state assessments for the current school year will be addressed during this IEP meeting, or **No** if they will not be discussed.

2. Click **Yes** if the parent has been informed that an accelerated plan of instruction is required if the student does not pass one or more assessments, **No** if the parent has not been informed, **Not Applicable** if an accelerated plan of instruction is not applicable.
3. Click **Yes** if Committee Members understand all the assessment options, including the characteristics of each assessment and the potential implications of each assessment choice, or **No** if they do not.

Selecting State Assessments

On draft of Section IV-B, the system auto-populates the required state assessments based on the student’s current grade from Enrollment. If there are no required state/district tests, none will be listed in this area, and there will be a statement that says, “[Student] was not enrolled in a grade level assessed by the State of Texas Assessments of Academic Readiness (STAAR).” ***NOTE: It is the district’s responsibility to keep the test Type and Accommodations shared lists updated per TEA State Assessment changes.

Grade Level	Required Assessments
03	Reading/Language Arts and Math
04	Reading/Language Arts and Math
05	Reading/Language Arts, Math, and Science
06	Reading/Language Arts and Math
07	Reading/Language Arts and Math
08	Reading/Language Arts, Math, Science, and Social Studies ***NOTE: If taking Algebra, choose Algebra from Subject dropdown and appropriate accommodations.

Example Grades 3-8

Reading **4.**

Type Language

-- Select -- **a.** -- Select -- **b.**

Accommodations Comments

c. **d.**

4. **Subject**
 - a. **Type:** Choose **Type** of test from dropdown menu. ***NOTE: Test Type can be customized by the district via District Admin > Lists > Edit Shared Lists screen. Select Plugin is Forms.IEP.Section4b; Select ListKey is TestTypes.
 - b. **Language:** Choose **Language** test will be administered in from dropdown menu.

- c. **Accommodations:** Select **Accommodations** needed for test by clicking on shared list and choosing from available options. ***NOTE: Statements can be customized by the district. For district who have purchased SE 504, ELLA, and RtI and/or export state assessment information to TestHound, it is recommended that accommodations be consistently worded across all programs for clarity.
- d. **Comments:** Enter any additional **Comments** into text box. ***NOTE: Statements can be customized by the district.

Subject	Required Assessments
English	English I and English II
Math	Algebra I
Science	Biology
Social Studies	U.S. History

Example EOC

***NOTE: State assessment planning fields have been added for students in grades 9 – 12 so all tests can be documented. Two additional fields have been added for English and one additional field has been added for Math.

5. Subject

- a. **Type:** Choose **Type** of test from dropdown menu. ***NOTE: Test Type can be customized by the district via District Admin > Lists > Edit Shared Lists screen. Select Plugin is Forms.IEP.Section4b; Select ListKey is TestTypes.
- b. **Subject:** Choose **Subject** of test from dropdown menu.
- c. **Language:** Choose **Language** test will be administered in from dropdown menu.
- d. **Accommodations:** Select **Accommodations** needed for test by clicking on shared list and choosing from available options. ***NOTE: Statements can be customized by the district. For district who have purchased SE 504, ELLA, and RtI and/or export state assessment information to TestHound, it is recommended that accommodations be consistently worded across all programs for clarity.
- e. **Comments:** Enter any additional **Comments** into text box. ***NOTE: Statements can be customized by the district.

ERA 6.

Will take Will not take

6. **ERA (Early Reading Assessment):** If student is at a grade level that requires early reading assessment, choose **Will take** or **Will not take**. ***NOTE: If student is not at a grade level that requires ERA, a statement indicating that the student does not need to be assessed at this time will appear.

TELPAS (Texas English Language Proficiency Assessment System)

***NOTE: If student has not been identified as an English Learner (EL), a statement indicating the student does not need to take the test will appear.

Texas English Language Proficiency Assessment System (TELPAS)

If assessment results are available for Anderson, the data must be entered on the State Assessments tab under Students.

Administration Date	Grade	Listening	Speaking	Reading	Writing	Composite
Previous English Language Proficiency Assessment results are not available. 7.						
<input type="radio"/> The ARD committee, in conjunction with the LPAC, has determined that Anderson will take the general TELPAS in all four language domains - Listening, Speaking, Reading, Writing. 8.						
<input type="radio"/> The ARD committee, in conjunction with the LPAC, has determined that Anderson will be assessed in the following language domains, as noted below. Please select only the areas the student will be assessed. 9.						
<input type="checkbox"/> Listening <input type="checkbox"/> Speaking <input type="checkbox"/> Reading <input type="checkbox"/> Writing						
<input type="radio"/> The ARD committee, in conjunction with the LPAC, has determined that Anderson will receive designated supports, as noted below: 10.						
Listening TELPAS Accommodations <input type="text"/> ...						
Speaking TELPAS Accommodations <input type="text"/> ...						
Reading TELPAS Accommodations <input type="text"/> ...						
Writing TELPAS Accommodations <input type="text"/> ...						

- 7. If **TELPAS** scores have been entered manually or imported, the scores would display in this grid.
- 8. **[Student] will take the general TELPAS in all four language domains:** Choose this statement if the student will be assessed in all four domains without any designated supports.
- 9. **[Student] will be assessed in the following language domains:** Choose this statement if the student will be assessed in specific domains without any designated supports.
- 10. **[Student] will receive designated supports:** Choose this statement if the student will be assessed in specific domains with designated supports. ***NOTE: Statements can be customized by the district.

11. **[Student] will have a special administration of an online TELPAS:** Choose this statement if the student will receive a special administration of an online TELPAS assessment pending TEA approval. *****NOTE:** Statements can be customized by the district.
12. **[Student] meets the TELPAS Alternate eligibility:** Choose this statement if the student will be taking the TELPAS Alternate. *****NOTE:** Statements can be customized by the district.
13. **District Assessments:** Click **NA** if not applicable to this student, **Will take all** if the student will take all district assessments, or **Will not take the following** if student will be taking some but not all district assessments. Enter the assessments into the text box either by typing them in or clicking on the shared list to choose assessments which will be excluded. *****NOTE:** Assessments list can be customized by the district.
14. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
15. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
16. Click **Next Section** to transition to **Section V. Consideration of Least Restrictive Environment**.

17. **Form Shortcuts:** Choose the **Accelerated Plan/Intensive Program of Instruction, STAAR Alternate 2 Participation Requirements, TELPAS Alternate Participation Requirements** from the **Section IV-B. State Assessments Form Shortcuts** buttons for both the Current school year and Next school year.



18. To add a State Assessment page for the following school year, scroll up to the top of the screen and click on **Section IV.B State Assessments**.

A screenshot of a form titled 'IV-B. State Assessments'. Below the title, it says 'Up to 2 entries can be included in this section'. There are two input fields: 'Schedule' with 'Next' entered, and 'School Year' with '2020-21' entered. Below these fields is a button labeled 'Import from ELL Plan'. To the right of the form is a button labeled 'Form Shortcuts'. A red box highlights the title and the two input fields, and a red number '19.' is placed to the right of the box.

19. Scroll down to the bottom of the screen and enter state assessment information for Next school year.
- ***NOTE: The program will pull in the students' previous state assessment information into this form. It will be necessary for the user to make any and all changes as appropriate to accurately reflect the assessments recommended for Next Year. If the next years calendar has not been entered into the Districts Academic Year Calendar screen, users will not be able to run the State Assessment report for the Next year.

V. Consideration of Least Restrictive Environment

The purpose of this section is to consider the least restrictive environment for the student to receive a free and appropriate public education [ref. §1412(a)(5)(A), §300.114(a)(2)(ii), §300.101(a), §300.101(b), §300.116, Daniel R.R. v. SBOE (5th Cir. 1989), §300.116(e), §300.116(d), §300.116(b)(1), §1414(d)(1)(A)(i)(V), §1414(d)(1)(A)(i)(IV), §89.1075(d), §89.63(c), §89.1115(d)(3)(B), §89.61(a)(4)(B), §89.1085(c)].

V. Consideration of Least Restrictive Environment

Service and site consideration alternatives provided, tried, or considered (p, t, c), including supplementary aids and services in general and compensatory education, for which Adelaide is eligible and additional services needed are identified below. Consideration of the vocational training needs for students at or before entry into high school was discussed.

General Education (GE) Only	<input type="text"/>	Speech Therapy	<input type="text"/>
GE w/Accommodations	<input type="text"/>	Resource Room	<input type="text"/>
GE w/Support Services	<input type="text"/>	Self-Contained Classroom	<input type="text"/>
Tutorials	<input type="text"/>	Adaptive Equipment/AT	<input type="text"/>
Multi-Tiered Interventions	<input type="text"/>	Counseling	<input type="text"/>
General Vocational Education	<input type="text"/>	Related Services	<input type="text"/>
Bilingual Classes/ESL	<input type="text"/>	VAC Class	<input type="text"/>
Preschool/Pre-K	<input type="text"/>	On-The-Job Training	<input type="text"/>
School Health Services	<input type="text"/>	Homebound	<input type="text"/>
District AEP	<input type="text"/>	Hospital Class	<input type="text"/>
Accelerated Plan of Instruction	<input type="text"/>	RDSPD	<input type="text"/>
Dyslexia Services	<input type="text"/>	Home Campus	<input type="text"/>
Compensatory Services	<input type="text"/>	Section 504 Services	<input type="text"/>

Results: If efforts are not successful, provide reason(s):

1. For each of the service and site considerations listed, choose **Provided**, **Tried**, **Considered**, or **Not Applicable** from the dropdowns.
 - a. **Provided**: Item listed is currently being provided to the student.
 - b. **Tried**: Item listed had been provided to the student in the past through the continuum process or as a part of intervention. ***NOTE: Please refer to district administrators for clarification however, Tried could infer or imply the item was Considered.
 - c. **Considered**: Item listed has been considered for the student. ***NOTE: Please refer to district administrators for clarification however, acknowledging that an item was Considered could be a determining factor that the area was addressed during the meeting for audit purposes.
 - d. **Not Applicable**: Item listed is not applicable to the student.
2. **Results**: Enter into text box and/or choose options by clicking on shared list. ***NOTE: Statements can be customized by the district.
3. If efforts are not successful, enter reason(s) into text box and/or choose applicable reasons by clicking on shared list . ***NOTE: Statements can be customized by the district.

Evidence that removal of students with disabilities from the general educational environment/campus occurs only when the nature and severity of the disability is such that education in general education classes/campus with the use of supplementary aids and services cannot be achieved satisfactorily is based on the following:

4.

4. Enter **Evidence** into text box and/or choose applicable statements by clicking on shared list ***NOTE: Statements can be customized by the district.

Benefits

5.

Harmful Effects

6.

5. Enter expected **Benefits** of program into text box and/or choose applicable statements by clicking on shared list ***NOTE: Statements can be customized by the district.

6. Enter potential **Harmful Effects** of program into text box and/or choose applicable statements by clicking on shared list ***NOTE: Statements can be customized by the district.

Opportunities for Anderson to participate in all nonacademic and extracurricular activities available to students without disabilities to the maximum extent appropriate for the individual student:

Recess Health Services Athletics Choral Groups
 Lunch Transportation Band Recreational Services
 Assemblies Counseling Clubs Other Activities

7.

If other, then:

8.

If any of the above items are not checked, document the IEP Committee's decision to exclude this student from the opportunity to participate.

9.

Anderson is being educated with non-disabled students to the maximum extent appropriate to meet his needs and is unable to benefit from education with non-disabled students to any greater extent.

Yes No 10.

Deliberations

B I abc

11.

12.
Save

13.
Next Section

VI. Extended School Year Services (ESY)

7. Check any opportunities available to the student to participate in nonacademic and extracurricular activities.

8. If Other Activities is selected, use this text box to describe.

9. Explain any opportunities not checked by entering into text box and/or choosing applicable statements by clicking on shared list ***NOTE: Statements can be customized by the district.

10. Choose **Yes** if statement is true, and **No** if statement is false.



11. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
12. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
13. Click **Next Section** to transition to **Section VI. Extended School Year Services (ESY)**.

VI. Extended School Year Service (ESY)

The purpose of this section is to consider extended school year services based on data collection [ref. §300.106(b)(1), §89.1065(8), §89.1065(1)(A), §300.106(a)(1), §300.106(a)(2), §89.1065(2), §89.1065(4), §89.1065(3), §89.1055(c), §89.1065(d)].

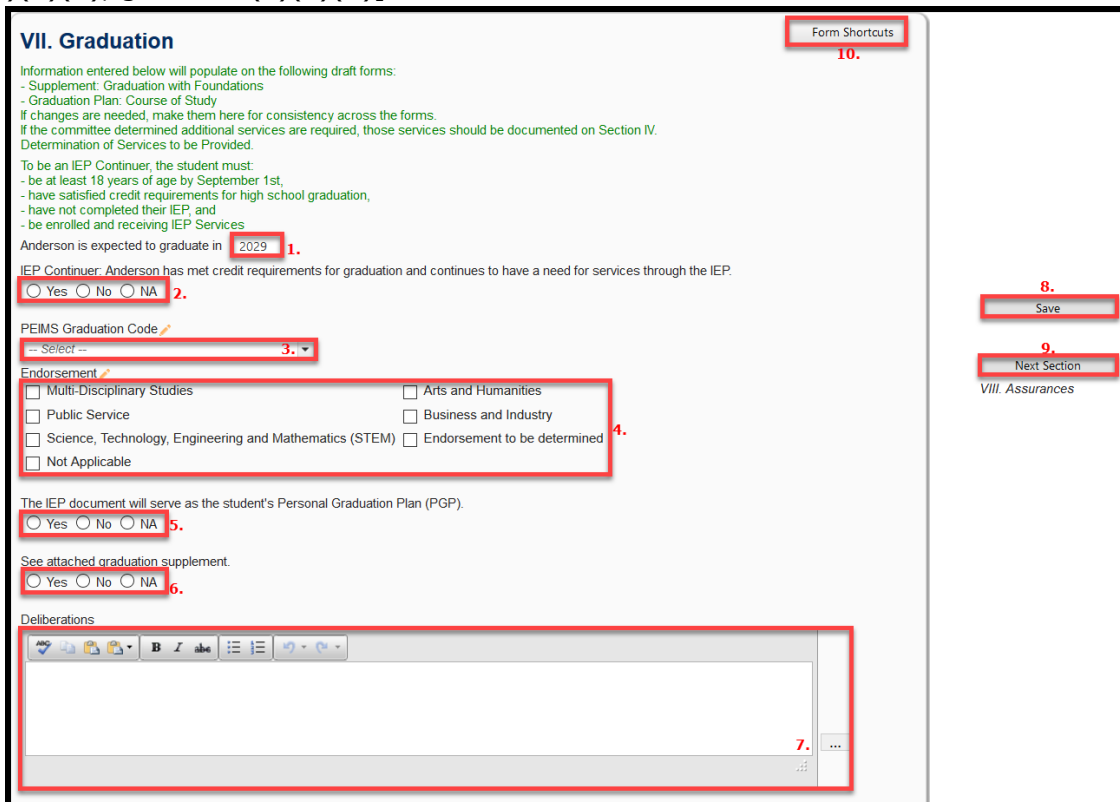
The screenshot shows the 'VI. Extended School Year Services (ESY)' form. It includes a 'Form Shortcuts' button (9), a 'Yes/No' selection (1), an 'Instructional Schedule' table with an 'Add new record' button (2), an 'ESY Program Name' dropdown (3), an 'ESY Transportation' selection (4), a 'Related Services Schedule' table with an 'Add new record' button (5), a 'Deliberations' text area with a shared list icon (6), a 'Save' button (7), and a 'Next Section' button (8) labeled 'VII. Graduation'.

1. Choose **Yes** if student is in need of ESY or **No** if student is not in need of ESY. *****NOTE:** For the student to pull into the Extended School Year (ESY) Services report, Yes must be checked for this this statement.
2. To add a new subject to the **Instructional Schedule** grid, click on the plus button to **Add new record**. *****NOTE:** Enter in schedule information for ESY subjects and insert when done. District Admins have the ability to lock down this list so staff can only select options available from the dropdown.
3. **ESY Program Name:** Choose from dropdown menu. *****NOTE:** Program Names can be customized by the district. This dropdown is the same as the list on the schedule of services page, however, it can be customized and used to categorize what type of ESY the student will be receiving for planning purposes.
4. **ESY Transportation:** Choose **Yes** if student will require ESY Transportation, **No** if he/she will not, or **NA** if it is not applicable.

5. To add a new subject to the **Related Services** grid, click on the plus button  to **Add new record**. ***NOTE: Enter in schedule information for ESY related services and insert when done. District Admins have the ability to lock down this list so staff can only select options available from the dropdown.
6. **Deliberations**: Enter manually by typing into box or by clicking on shared list to the right  for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
7. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
8. Click **Next Section** to transition to **Section VII. Graduation**.
9. **Form Shortcuts**: Choose the **Supplement: ESY, Transportation Information, or Extended School Year (ESY) Information** from the **Section VI. Extended School Year Services (ESY) Form Shortcuts** button.

VII. Graduation

The purpose of this section is to consider the framework upon which the student will graduate from high school [ref. §89.107(b)(1), §89.107(b)2A), §89.1070(b)(3), §89.1070(b)(4), §89.1070(b)(3)(A), §89.1070(b)(3)(B), §89.1070(b)(3)(C)].



The screenshot shows the 'VII. Graduation' form with the following elements highlighted by red boxes and numbered callouts:

- 1.** The year field for 'Anderson is expected to graduate in' is set to 2029.
- 2.** The radio button for 'Yes' is selected for 'IEP Continuer: Anderson has met credit requirements for graduation and continues to have a need for services through the IEP'.
- 3.** The 'PEIMS Graduation Code' dropdown menu is open, showing 'Select --'.
- 4.** The 'Endorsement' section includes checkboxes for 'Multi-Disciplinary Studies', 'Public Service', 'Science, Technology, Engineering and Mathematics (STEM)', 'Not Applicable', 'Arts and Humanities', 'Business and Industry', and 'Endorsement to be determined'.
- 5.** The radio button for 'Yes' is selected for 'The IEP document will serve as the student's Personal Graduation Plan (PGP)'.
- 6.** The radio button for 'Yes' is selected for 'See attached graduation supplement'.
- 7.** The 'Deliberations' text area is empty, with a toolbar above it and a dropdown arrow on the right.
- 8.** The 'Save' button is highlighted.
- 9.** The 'Next Section' button is highlighted.
- 10.** The 'Form Shortcuts' button is highlighted.

1. The year the student is expected graduate will automatically calculate and display in this field in YYYY format.
2. Choose **Yes** to document if the student is an **IEP Continuer**. ***NOTE: If the student is an IEP Continuer, consider making sure the student has a Current Grade of 12 and Next Grade of PS or 12/12 on the students Enrollment screen. If the

- student is listed as 12 for Current year and GR for Next year, once rollover occurs, the student's data will be pushed into the Inactive or Beyond High School campus.
3. Choose the **PEIMS Graduation Code** from the dropdown. ***NOTE: Options can be customized by the district.
 4. Select Endorsement(s). ***NOTE: Options can be customized by the district.
 5. Choose **Yes** if the IEP document will serve as the student's Personal Graduation Plan (PGP), **No** if it will not, or **NA** if it is not applicable to the student.
 6. Choose **Yes** if the Graduation with a Statement of Transition is attached, **No** if it is not, or **NA** if it is not applicable to the student.
 7. **Deliberations**: Enter manually by typing into box or by clicking on shared list to the right for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.
 8. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
 9. Click **Next Section** to transition to **Section VIII. Assurances**.
 10. **Form Shortcuts**: Choose the **Supplement: Transition, Supplement: Graduation, Graduation Plan, or Supplement: Graduation with Foundations** from the **Section VII. Graduation Form Shortcuts** button.

VIII. Assurances

VIII. Assurances

The committee assures the following: that special education placement is as close as possible to Anderson's home; that for national origin minority group students or linguistically different students, placement is not based on criteria which were developed solely on command of the English language; and that placement is based on peer-reviewed research to the extent practicable.

Basis for Assurance

adaptations in testing procedures review of parent/student information

use of interpreter review of language assessment 1.

The committee assures that special education placement is not based on deficiencies identified as directly attributable to a different culture, lifestyle, or lack of educational opportunities.

Basis for Assurance

review of parent/student information review of sociological assessment 2.

Initials 3.

The IEP committee assures that the student is being educated with students his/her age who do not have disabilities to the maximum extent appropriate to his/her overall educational needs (including academic and developmental areas such as language and socialization).

-- Select or Enter --

The committee assures that all instruction and related services specified in the IEP will be provided to the student at no cost. Fees normally charged to students without disabilities or their parents as part of the general education program may be charged (i.e., art or laboratory fees).

-- Select or Enter --

The district assures that each teacher who provides instruction to a student with disabilities will receive relevant sections of the student's current IEP and that each teacher will be informed of specific responsibilities related to implementing the IEP, such as goals and benchmarks, and of needed accommodations, modifications, and/or supports for the child.

-- Select or Enter --

The district does not discriminate on the basis of gender, disability, race, color, age or national origin in its education programs, activities, or employment as required by Title IX, Section 504 and Title VI.

1. **Basis for Assurance:** Check all that apply as the basis for assurances listed in the statement above.
2. **Basis for Assurance (regarding culture/lifestyle/lack of educational opportunities):** Check all that apply as the basis for assurances listed in the statement above.
3. **Initial:** Enter initials of committee member reading assurances. ***NOTE: This is typically the LEA Administrator or Designee.

4. **Deliberations:** Enter manually by typing into box or by clicking on shared list to the right [...] for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations.**
5. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
6. Click **Next Section** to transition to **Section IX. Signatures of IEP Committee Members.**

IX. Committee Membership

The purpose of this section is to indicate the names, position, signatures of members participating and whether or not each member is in agreement or disagreement with decisions made by the committee. If agreement is not reached, parents must be offered a recess to gather information to be considered, provide a written statement for the disagreement, and decide upon date, time and location for reconvening, and provide Prior Written Notice to implement the IEP it has deemed appropriate if consensus cannot be reached [ref. §89.1050(e), §89.1050(h), §89.1050(h)(1), §89.1050(h)(5), §89.1050(h)(3), §89.1050(h)(2), §89.1050(h)(6), §89.1050(h)(4), §89.1050(g)(4)].

IX. Committee Membership Form Shortcuts

These signatures indicate the participation of the individual members of the IEP committee. A copy of this form will be given to Anderson's parents and any team member or staff person who is directly involved in Anderson's Individual Education Program.

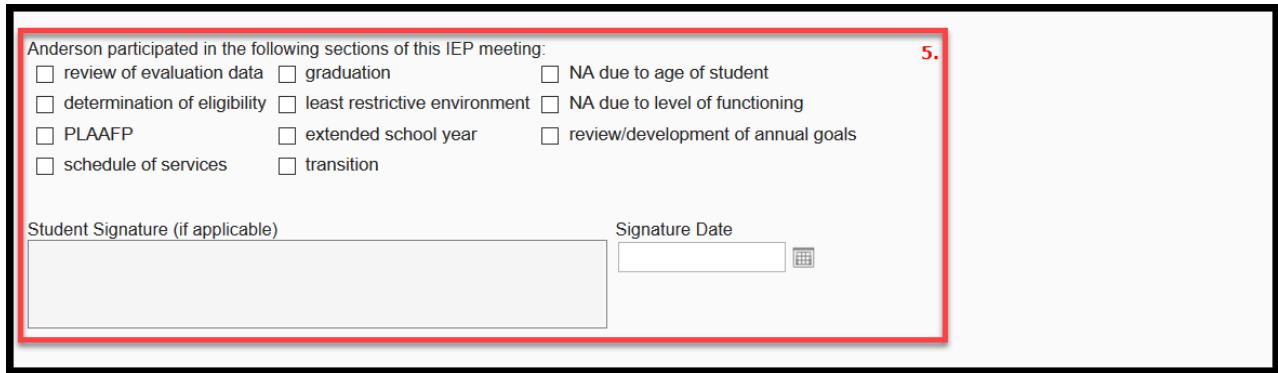
Signature	Team Member	Position	Participation Mode
	Stephanie Marullo 1.	Parent/Adult Student* Agrees <input type="checkbox"/> Yes <input type="checkbox"/> No 3.	-- Select -- 4.
		Parent 2* Agrees <input type="checkbox"/> Yes <input type="checkbox"/> No	-- Select --
	-- Select or Enter --	LEA Representative	
	-- Select or Enter --	Assessment	-- Select -- *
	-- Select or Enter -- 2.	-- Select or Enter --	-- Select -- *
	-- Select or Enter --	-- Select or Enter --	-- Select -- *
	-- Select or Enter --	-- Select or Enter --	-- Select -- *
	-- Select or Enter --	-- Select or Enter --	-- Select -- *
	-- Select or Enter --	-- Select or Enter --	
	-- Select or Enter --	-- Select or Enter --	
	-- Select or Enter --	-- Select or Enter --	

* Optional Participation

***NOTE: Parent/Adult Student and Parent 2 names can be entered into the Team Member field. District staff member names can be selected from the Team Member dropdown. Signatures can be captured electronically by using a touch screen device. Signatures can also pull into the field once the staff members name has been selected if the district has opted to turn on Digital Signatures for the program through the District Admin > Form Customizations tab.

1. Required IEP committee members are designated in the Position column.
2. Other potentially required members are also designated. However, if the position is not required for that meeting, they can be removed or replaced with another position (e.g., Speech Therapist). ***NOTE: Changes saved to the Position fields will persist to subsequent IEP Meeting > Committee Membership pages.
3. **Agrees:** If committee member agrees, choose **Yes**. If committee member does not agree, choose **No**.
4. **Participation Mode:** Choose committee member's mode of participation from dropdown menu. ***NOTE: This is a district Customization Option and may be

enabled by district administrator. If this Customization is enabled, users will see a blank as an option to select from the dropdown.

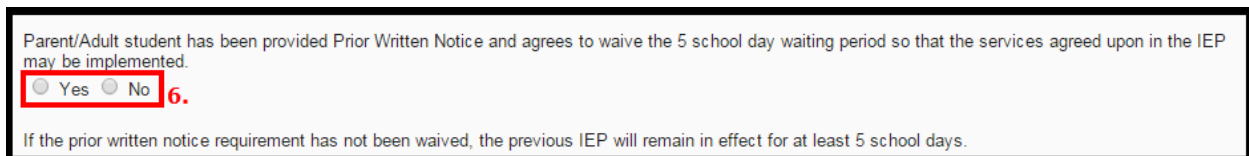


Anderson participated in the following sections of this IEP meeting: 5.

<input type="checkbox"/> review of evaluation data	<input type="checkbox"/> graduation	<input type="checkbox"/> NA due to age of student
<input type="checkbox"/> determination of eligibility	<input type="checkbox"/> least restrictive environment	<input type="checkbox"/> NA due to level of functioning
<input type="checkbox"/> PLAAFP	<input type="checkbox"/> extended school year	<input type="checkbox"/> review/development of annual goals
<input type="checkbox"/> schedule of services	<input type="checkbox"/> transition	

Student Signature (if applicable) _____ Signature Date _____

5. Indicate the sections of the IEP meeting that the student participated in by checking the appropriate boxes. Student Signature can be entered electronically into form.

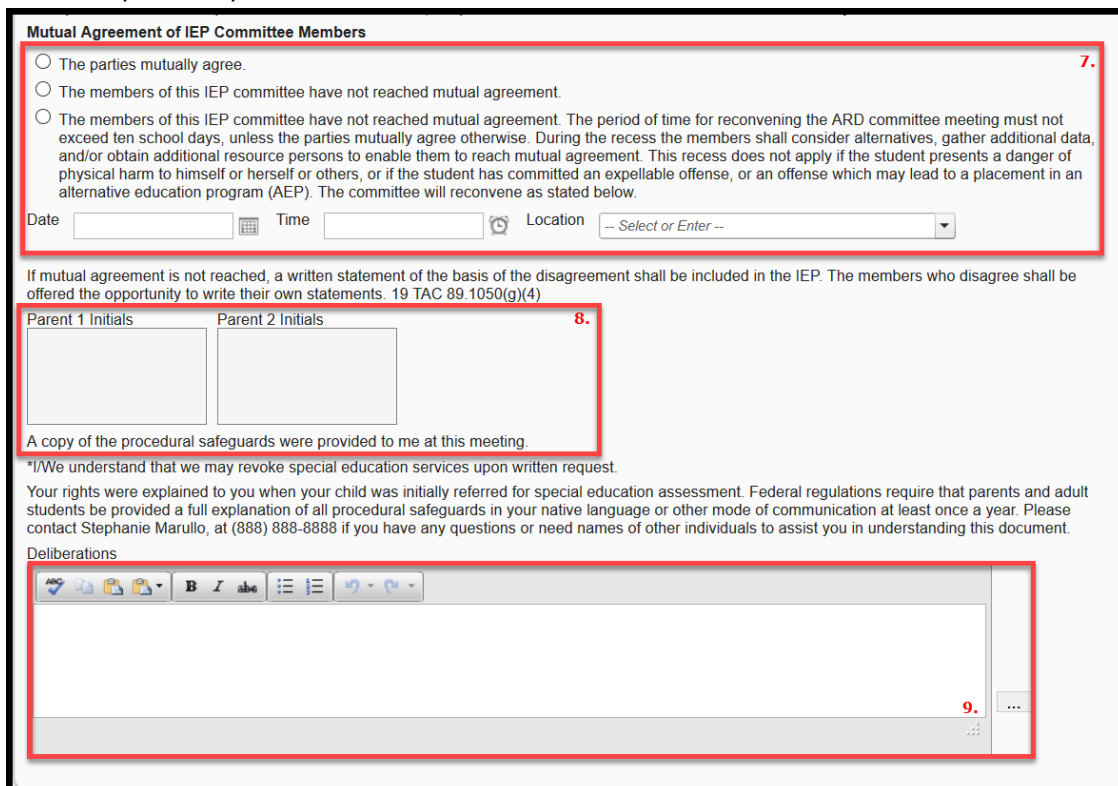


Parent/Adult student has been provided Prior Written Notice and agrees to waive the 5 school day waiting period so that the services agreed upon in the IEP may be implemented.

Yes No 6.

If the prior written notice requirement has not been waived, the previous IEP will remain in effect for at least 5 school days.

6. If the parent or adult student agrees to waive the 5-school day written notice, choose **Yes**; if not, choose **No**.



Mutual Agreement of IEP Committee Members 7.

The parties mutually agree.

The members of this IEP committee have not reached mutual agreement.

The members of this IEP committee have not reached mutual agreement. The period of time for reconvening the ARD committee meeting must not exceed ten school days, unless the parties mutually agree otherwise. During the recess the members shall consider alternatives, gather additional data, and/or obtain additional resource persons to enable them to reach mutual agreement. This recess does not apply if the student presents a danger of physical harm to himself or herself or others, or if the student has committed an expellable offense, or an offense which may lead to a placement in an alternative education program (AEP). The committee will reconvene as stated below.

Date _____ Time _____ Location -- Select or Enter --

If mutual agreement is not reached, a written statement of the basis of the disagreement shall be included in the IEP. The members who disagree shall be offered the opportunity to write their own statements. 19 TAC 89.1050(g)(4)

Parent 1 Initials _____ Parent 2 Initials _____ 8.

A copy of the procedural safeguards were provided to me at this meeting.

*I/We understand that we may revoke special education services upon written request.

Your rights were explained to you when your child was initially referred for special education assessment. Federal regulations require that parents and adult students be provided a full explanation of all procedural safeguards in your native language or other mode of communication at least once a year. Please contact Stephanie Marullo, at (888) 888-8888 if you have any questions or need names of other individuals to assist you in understanding this document.

Deliberations

_____ 9.

7. Indicate **IEP Committee** Members agreement and, if reconvening, indicate **Date**, **Time**, and **Location** of reconvened meeting.

8. **Parent 1** and **Parent 2 Initials** can be entered electronically into the form.

***NOTE: This is a district Customization Option and may be enabled by district administrator.

- Deliberations:** Enter manually by typing into box or by clicking on shared list to the right [...] for options. Deliberations from all areas of the IEP Meeting will appear in form **X. Deliberations**.

- Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.
- Click **Next Section** to transition to **Section X. Deliberations**.
- Form Shortcuts:** Choose the **Notice of Decision-Prior Written Notice, Notice to the Parent to Release Information for SHARS, Parent/Guardian Acknowledgement, or Consent: Initial Placement** from the **Section IX. Signature of IEP Committee Members Form Shortcuts** button.

X. Deliberations

- Enter any **Additional Deliberations** into text box by manually typing into box or by clicking on shared list to the right [...] for options. Deliberations from all areas of the IEP Meeting will appear above this text box. *****NOTE:** Additional Deliberations will persist to the next IEP Meeting of the same type (e.g., Brief to Brief, IEP to IEP).
- Team Member name can be entered electronically into the form.
- Choose the name of IEP **Team Member** who is entering deliberations into form.
- Choose **Position** of IEP Team Member.
- Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved.

6. **Form Shortcuts:** Choose the **Consent: Initial Placement, Decline Special Education Services, Notice of Decision-Prior Written Notice, and SHARS Notice** from the **Section X. Deliberations Form Shortcuts** button.

IEP Meeting PEIMS 163 Data Elements

Form Shortcuts

II. Determination of Eligibility

Based on the evaluation data reviewed, the committee has determined that Anderson

does not meet specific Federal eligibility criteria to receive special education services.
 meets specific Federal eligibility criteria (has both a disability and educational need for special education services) based on the following conditions:

Condition 1 Specific Learning Disabilities	Condition 4
Condition 2 Speech Impairment	Condition 5
Condition 3	

Indicators

Medically Fragile
 Multiple Disabilities

Section II. Determination of Eligibility:

Condition 1 = Pri Dis

Condition 2 = Sec Dis

Condition 3 = Ter Dis

Multiple Disabilities = Mul Dis

Change Student Id

Demographics | Parental Info | Enrollment | Program Compliance | State Assessments | Student Services

Special Education | Bilingual/ESL | Gifted and Talented | Section 504 | RtI | Dyslexia | Medicaid

Special Education Compliance

Date entered SpEd: 5/1/2020 If Transfer, 30-day timeline: Annual IEP meeting date: 5/1/2020 Next Annual IEP Due Date: 5/1/2021 Date left SpEd:

Status: Initial Services Start Date: 5/1/2020 **Child Count Funding Type: 3 - IDEA-B [34 CFR §300.703(t)]** Instructional Arrangement: 41 - Resource Room (Less than 21%) Speech Count: 0

Interpreting Service Type: ECSE Location: Assistive Technology: RDSPD Code: 0 District of RDSPD:

Program Name: -- Select -- **ECI Indicator: No** **ECSE Indicator: Yes** Behavior Intervention Plan: Yes No IEP Continuer: Yes No NA Expected to graduate in: 2029

Program Compliance:

Child Count Funding Type = CCFT

ECI Indicator = ECI Ind

ECSE Indicator = ECSE Ind

Instructional Schedule

+ Add new record Refresh

Subject	Semester	Service Provider	Grade Assigned By	Min. Gen	Min. SpEd	Freq. / Duration	Service Type	RDSPD
✎ ✕ Reading	Spring	Special Education Teacher	Special Education	0	60	1 / day	Direct	<input checked="" type="checkbox"/>

+ Add new record Refresh

Instructional Schedule

+ Add new record Refresh

Subject	Semester	Service Provider	Grade Assigned By	Min. Gen	Min. SpEd	Freq. / Duration	Service Type	RDSPD
> ✎ ✕ Reading	Spring	Special Education Teacher	Special Education	0	60	1 / day	Direct	<input type="checkbox"/>
> ✎ ✕ Speech Therapy	Spring	Speech Language Pathologist	Not Applicable	0	30	5 / 6 wks (G)	Direct	<input type="checkbox"/>

+ Add new record Refresh

Instructional Time calculations are referenced for state reporting purposes only.

Instructional Time: 360

If the Services Start Date occurs during the Spring Semester, Fall Schedule Instructional Arrangement will not calculate.
 If the Duration of Services Date occurs before the Spring Semester, Spring Schedule Instructional Arrangement will not calculate.

Fall Schedule Instructional Arrangement | Anderson's Instructional Time: | Anderson's Percentage Special Education Time:
 Spring Schedule Instructional Arrangement | Anderson's Instructional Time: 360 | Anderson's Percentage Special Education Time: 18.06%, Instructional Arrangement: 41 - Resource Room (Less than 21%), Speech Count: 2

Program Name District of RDSPD ECSE Location ...

For Deaf/Hard of Hearing, select PEIMS Predominant Interpreting Service Type

Section IV. Determination of Services to Be Provided:

- Subject RDSPD checked = RDSPD Srv
- Instructional Arrangement = IA
- Speech County = SC
- PEIMS Predominant Interpreting Service Type = Int Srv

Related Services Schedule




+ Add new record Refresh

Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From
✎ ✕ Audiological Services	Spring	Audiologist	30	5 / week	Direct	General Education

+ Add new record Refresh


Section IV. Determination of Services to Be Provided:


- Related Services > Audiological Services = Aud Srv



Program Name  District of RDSPD  ECSE Location 
 -- Select -- [] 0 ...
 For Deaf/Hard of Hearing, select PEIMS Predominant Interpreting Service Type
 []


Section IV. Determination of Services to Be Provided:

ESCE Location = ECSE Loc

Related Services Schedule 


+ Add new record  Refresh


Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From
  Counseling	Spring	Counselor	30	3 / week	Direct	General Education



+ Add new record  Refresh


Section IV. Determination of Services to Be Provided:

Related Services > Counseling = Coun Srv

Related Services Schedule 


+ Add new record  Refresh


Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From
  Medical/Diagnostic Services	Spring	Nurse	15	3 / day	Direct	General Education



+ Add new record  Refresh


Section IV. Determination of Services to Be Provided:

Related Services > Medical/Diagnostic Services = Med Diag

Related Services Schedule 


+ Add new record  Refresh


Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From
  Occupational Therapy	Spring	Occupational Therapist	15	5 / 6 wks	Direct	General Education



+ Add new record  Refresh


Section IV. Determination of Services to Be Provided:

Related Services > Occupational Therapy = OT Ind

Related Services Schedule 

+ Add new record  Refresh

Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From
  Orientation Mobility	Spring	O & M Specialist	15	5 / 6 wks	Direct	General Education

+ Add new record  Refresh

Section IV. Determination of Services to Be Provided:

Related Services > Orientation Mobility = OM Ind

Related Services Schedule							
+ Add new record Refresh							
Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From	
Physical Therapy	Spring	Physical Therapist	15	5 / 6 wks	Direct	General Education	
+ Add new record Refresh							

Section IV. Determination of Services to Be Provided:

Related Services > Physical Therapy = PT Ind

Related Services Schedule							
+ Add new record Refresh							
Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From	
Psychological Services	Spring	Psychologist	15	5 / 6 wks	Direct	General Education	
+ Add new record Refresh							

Section IV. Determination of Services to Be Provided:

Related Services > Psychological Services = Psy Srv

Related Services Schedule							
+ Add new record Refresh							
Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From	
Recreation Therapy	Spring	Psychologist	15	5 / 6 wks	Direct	General Education	
+ Add new record Refresh							

Section IV. Determination of Services to Be Provided:

Related Services > Recreation Therapy = Rec Ther

Related Services Schedule							
+ Add new record Refresh							
Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From	
School Health	Spring	Nurse	15	5 / 6 wks	Direct	General Education	
+ Add new record Refresh							

Section IV. Determination of Services to Be Provided:

Related Services > School Health = Sch Hlth

Related Services Schedule							
+ Add new record Refresh							
Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From	
Social Work Services	Spring	Social Worker	15	5 / 6 wks	Direct	General Education	
+ Add new record Refresh							

Section IV. Determination of Services to Be Provided:

Related Services > Social Work Services = Socl Work

Related Services Schedule

Service	Semester	Service Provider	Minutes	Freq. / Duration	Service Type	Removed From
Transportation	Spring	Bus Driver	0	2 / day	Out of School	

Section IV. Determination of Services to Be Provided:

Related Services > Transportation = Tran Ind

III. Present Levels of Academic Achievement and Functional Performance

Physical

Assistive Technology Yes No

Section III. Present Levels of Academic Achievement and Functional Performance:

Assistive Technology > Yes = Asst Tech

Indicators

Medically Fragile Multiple Disabilities

Section II. Determination of Eligibility:

Medically Fragile = Med Frag

Program Name: District of RDSPD

ECSE Location: 0

For Deaf/Hard of Hearing, select PEIMS Predominant Interpreting Service Type

Section IV. Determination of Services to Be Provided:

District of RDSPD = District of RDPSD

IV. Determination of Services to Be Provided

Up to 3 entries can be included in this section

Ensure the Schedule, Academic Year, Services Start Date, and Duration of Services occur during the same school year.

Schedule: Current | Academic Year: 2019-20 | Services Start Date: 5/1/2020 | Duration of Services: 5/29/2020 | Campus Assignment: Marullo Elementary Sc

Section IV. Determination of Services to Be Provided:

Services Start Date = Services Start Date

Change Student Id
Demographics | Parental Info | Enrollment | Program Compliance | State Assessments | Student Services

Special Education | Bilingual/ESL | Gifted and Talented | Section 504 | RTI | Dyslexia | Medicaid

Special Education Compliance

Date entered SpEd: 5/1/2020 | If Transfer, 30-day timeline: | Annual IEP meeting date: 5/1/2020 | Next Annual IEP Due Date: 5/1/2021 | Date left SpEd: |

Status: Initial | Services Start Date: 5/1/2020 | Child Count Funding Type: 3 - IDEA-B [34 CFR §300.703(b)] | Instructional Arrangement: 41 - Resource Room (Less than 21%) | Speech Count: 2

Program Compliance:

Status = Enrollment Status

Individualized Education Program Meeting

Form Shortcuts

Meeting Date: 5/1/2020 | This is an annual IEP: Yes No | Explanation of Procedural Safeguards was provided: Yes No N/A

IEP Meeting Form Title Page:

Meeting Date = IEP Date

This is an annual IEP > Yes/No = Annual IEP

I. Review of Evaluation Data

Form Shortcuts

Full and Individual Evaluation

Current Date: 4/27/2020 | Next Due Date: 4/27/2023

Section I. Review of Evaluation Data:

Full and Individual Evaluation > Current Date = FIE Date

Service Plan Meeting

The Service Plan is utilized for students who are in a parentally placed private or home school setting. On lock of the Service Plan Meeting form, the student's status is updated to Private/Home. ***NOTE: 1) Per the Student Attendance Accounting Handbook, "Students 3-5 years of age should be "dually enrolled" and not served as Private/Home unless the parent does not want to enroll the child". 2) For students who are referrals, the IEP Meeting form should be used and locked so the student will be recorded on the Indicator 11 report. The status can be changed manually from Initial to Private/Home and then the Service Plan form can be utilized for all future meetings. 3) Locking a Service Plan Meeting without a Determination of Eligibility will change the student's status to on Program Compliance to Dismissal.

Related Forms: Contact Log, Notice of Service Plan Meeting, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student identifier 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, a status bar shows 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' with an 'Edit Student Information' button and a 'Hover for more information' link. A navigation bar includes 'New/Edit Forms', 'Locked', and 'History' tabs. The main area features a dropdown menu with 'Service Plan Meeting' selected, highlighted by a red box and labeled '1.'. To its right is a 'New / Edit' button, highlighted by a red box and labeled '2.'. A 'View All Drafts' button is also visible.

Required Fields: Meeting Date, Annual IEP, and Parent 1 Name.

1. Choose **Service Plan Meeting** from the **Student Forms** dropdown menu.
2. Click **New Draft**.

(Click here for more detailed instructions on the [Individualized Education Program Meeting](#) form).

Amendment to the Individualized Education Program

To amend the IEP without an ARD, the parent and Local Educational Agency (LEA) must agree not to convene a meeting for the purpose of making changes to the IEP. The Amendment process allows for revisions of the IEP without a meeting except for:

- Determination of eligibility,
- Change of placement, or
- Manifestation determination reviews [ref. §300.324(a)(4), §300.324(a)(6), §300.116, §300.306, §300.530(e)].

Suggested Uses for Amendments

*****NOTE:** Refer to local operating guidelines regarding use of the Amendment.

1. Make changes to instructional accommodations.
2. Make changes to state testing accommodations.
3. Clerical corrections.

Related Forms: Contact Log, Notice of IEP Meeting, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student identifier 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, a status bar shows 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' with an 'Edit Student Information' button and a 'Hover for more information' link. A navigation bar includes 'New/Edit Forms', 'Locked', and 'History' tabs. The main area features a dropdown menu with 'Amendment to the Individualized Education Program (IEP)' selected, highlighted by a red box and labeled '1.'. To its right is a 'New / Edit' button, highlighted by a red box and labeled '2.'. A 'View All Drafts' button is also visible.

Required Fields: Amendment Date, Services Start Date, and Parent 1 Name.

1. Choose **Amendment to the Individualized Education Program (IEP)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete/edit additional sections as needed (data will import from last locked ARD/IEP). Unless required by local guidelines, a Notice of IEP Meeting is not required. (Click here for more detailed instructions on the [Individualized Education Program Meeting](#) form).

Brief Individualized Education Program (Brief IEP)

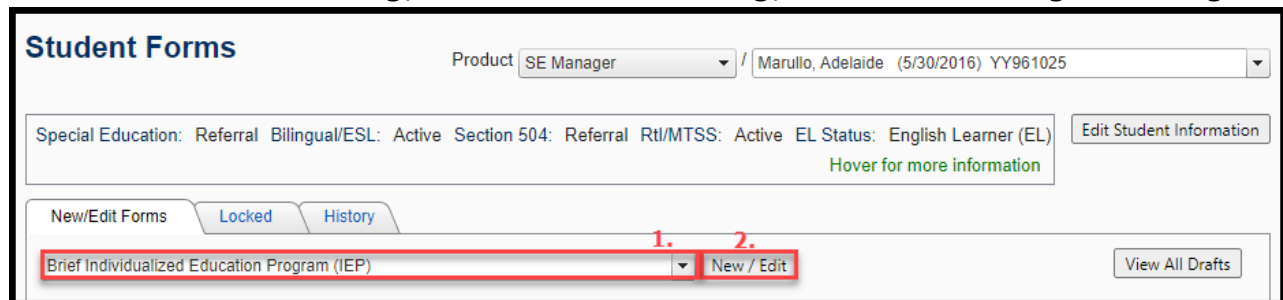
Brief IEPs may be utilized for any IEP Meeting that is not an Annual. The advantage of using the Brief is that the system does not require you to address each section of the meeting form. *****NOTE**: District administrators can change the Title on the Brief IEP Meeting form. This change can be made via District Admin > Districts > Edit Customization Options screen.

Suggested Uses for Brief IEPs

*****NOTE**: Refer to local operating guidelines regarding use of the Brief.

1. Any meeting that is not an Annual.
2. Dismissal and/or DNQ ARDs.
3. Manifestation Determination Review ARDs.
4. Review updated evaluation data.
5. Make changes to instructional accommodations.
6. Make changes to state testing accommodations.
7. Add/Remove related services.
8. Add goals and/or objectives.
9. Correct Instructional Arrangement (PEIMS) code on **Section IV. Determination of Services to be Provided** page due to clerical error.

Related Forms: Contact Log, Notice of IEP Meeting, Procedural Safeguards Log



The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a status bar with 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. A 'Hover for more information' link is present. The main area has tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Brief Individualized Education Program (IEP)' with a red box around it and a red '1.' next to it. To the right of the dropdown is a 'New / Edit' button with a red '2.' next to it. A 'View All Drafts' button is also visible.

Required Fields: Brief IEP Date, Services Start Date, and Parent 1 Name.

1. Choose **Brief Individualized Education Program (IEP)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete/edit additional sections as needed (data will import from last locked ARD/IEP). A Notice of IEP Meeting is required. (Click here for more detailed instructions on the [Individualized Education Program Meeting](#) form).

Dismissals and DNQs

The suggested sections to be completed for Dismissals and DNQs include:

- **Brief IEP Meeting** title page,
- **Section I. Review of Evaluation Data,**
- **Section II. Determination of Eligibility,**
- **Section IX. Committee Membership,** and
- **Section X: Deliberations.**

Since the schedule page is not included in a Dismissal or DNQ meeting, a **Services Start Date** is required on the **Brief IEP Meeting** title page. Upon locking of the Dismissal or DNQ ARD, the program will automatically change the student's status from an active status to Dismissal or DNQ on the Program Compliance screen. ***NOTE: Once status is no longer Active (i.e., Active, Initial, Private/Home, Transferred) student's forms can no longer be unlocked.

Transfer Individualized Education Program

The purpose of a Transfer is to facilitate the transition of a student with a disability from one district to another to ensure the current district has taken the necessary steps to obtain records and provide comparable services [ref. §99.31 (a)(2), §300.323(g), §300.304(c)(5), §300.323(e), §300.323(f)].

Related Forms: Contact Log, Notice of IEP Meeting, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student information dropdown for 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, a status bar shows 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' with an 'Edit Student Information' button and a 'Hover for more information' link. A navigation bar includes 'New/Edit Forms', 'Locked', and 'History' tabs. The main area features a dropdown menu with 'Transfer Individualized Education Program (IEP)' selected, and a 'New / Edit' button next to it. A 'View All Drafts' button is also present. Red boxes and numbers '1.' and '2.' highlight the dropdown menu and the 'New / Edit' button, respectively.

Required Fields: Transfer Meeting Date, Services Start Date, Parent 1 Name,

1. Choose **Transfer Individualized Education Program (IEP)** from the **Student Forms** dropdown menu.
 2. Click **New Draft**.
 3. Complete the title page and the **Verification of IEP** section (this allows proper reporting to PEIMS on lock of the Transfer form). Address other sections as needed. Notice of IEP Meeting is required. (Click here for more detailed instructions on the [Individualized Education Program Meeting](#) form).
 4. Completion of the Transfer IEP and the Verification of IEP section is important for out of state Transfer students needing a new evaluation. Choosing the third radio with an **initial consent for evaluation** will trigger the system to place this student on the Indicator 11 report. In this case, the Transferred student from out of state will respond like a referral with the appropriate referral timelines.
 5. Upon completion and lock of the FIIE, the student's status will change to Initial or Dismissal based on eligibility.
- ***NOTE: Additional forms are included with the Transfer IEP for districts that continue to conduct Transfer IEP Meetings preceding a 20-School Day Placement/Annual IEP Meeting.

Additional IEP Meeting Forms

Accelerated Education Plan

Related Forms: IEP Meeting, Notice of IEP Meeting

Required Fields: Date of Plan Creation, Parent/Guardian Name, Parent/Guardian Address, Plan provided to parent/guardian on

1. Choose **Accelerated Education Plan** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Plan**, Calendar Year, select **Parent/Guardian Name** from dropdown, select **Parent/Guardian Address** from dropdown, select **Parent/Guardian Phone** from dropdown and save. Complete **Plan Development**, make sure to enter a date for **Plan provided to parent/guardian on**, and save.

Accelerated Plan/Intensive Program of Instruction

***NOTE: When a new form has been drafted and the Calendar Year has been selected from the dropdown, scores are displayed for the selected Calendar Year if scores are available. If scores are not available, the form will display scores from the last locked form.

Related Forms: IEP Meeting, Notice of IEP Meeting

Required Fields: Meeting Date

4. Choose **Accelerated Plan/Intensive Program of Instruction** from the **Student Forms** dropdown menu.
5. Click **New Draft**.
6. Enter **Meeting Date**, **Calendar Year**, **Teacher assigned to provide supplemental instruction**, **location of supplemental instruction**, **Plan Type**, and save. Complete **Plan Information** and save.

Accept Alternative Placement Services

Related Forms: IEP Meeting, Notice of IEP Meeting

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student ID field 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is a button labeled 'Edit Student Information' and a link 'Hover for more information'. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, a dropdown menu is open, showing 'Accept Alternative Placement Services' selected. A red box highlights this dropdown, with a red '1.' next to it. To the right of the dropdown is a 'New Draft' button, which is also highlighted with a red box and a red '2.' next to it. At the bottom right of the form area is a 'View All Drafts' button.

Required Fields: Meeting Date, Date placed in alternative setting, Parent's Name

1. Choose **Accept Alternative Placement Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Meeting Date, Date place in alternative setting,** and **Parent's Name**. Complete form and save.

Administrative Discipline Plan

Related Forms: IEP Meeting, Notice of IEP Meeting

This screenshot is identical in layout to the previous one, showing the 'Student Forms' interface. The dropdown menu is now open to 'Administrative Discipline Plan', which is highlighted with a red box and a red '1.' next to it. The 'New Draft' button to its right is also highlighted with a red box and a red '2.' next to it. The rest of the interface, including the product dropdown, student ID, status indicators, and 'View All Drafts' button, remains the same.

Required Fields: Date

1. Choose **Administrative Discipline Plan** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save. *****NOTE:** Statements in the Parent requested that the following...text field on this screen can be customized by district administrator.

Annual Goals

For districts also licensing SE IEP Goals, drafts of the Annual Goals form will display in both products, regardless of where the form was originally drafted. Draft progress reports are auto created on lock of this form but are only available and must be written in SE IEP Goals. (See **SE IEP Goals User Guide** for additional information regarding Annual Goals). *****NOTE:** The Annual Goals form can not be locked as part of an IEP Meeting Form Set and must be locked as a separate form.

Related Forms: IEP Meeting, Notice of IEP Meeting

The screenshot shows the 'Student Forms' page in SE Manager. At the top, the product is 'SE Manager' and the user is 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open showing 'Annual Goals' selected. A red box highlights the dropdown menu, and a red box highlights the 'New Draft' button. Red numbers '1.' and '2.' are placed above the dropdown and button respectively.

Required Fields: Start Date, End Date, Goal Start Date, Subject/Focus, Goal Identifier

1. Choose **Annual Goals** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Start Date, End Date, Goal Start Date,** and **Subject/Focus**.

Behavior Intervention Plan

There are now 3 Behavior Intervention Plans within SE Manager – Behavior Intervention Plan, Behavior Intervention Plan (BIP), and the Functional Behavior Assessment > Behavior Intervention Plan. *****NOTE:** Once a district has determined which BIP they want their staff to utilize, district administrators can "hide" the others in the District Admin>Edit District Customizations screen.

The screenshot shows the 'Student Forms' page in SE Manager. At the top, the product is 'SE Manager' and the user is 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open showing 'Behavior Intervention Plan' selected. A red box highlights the dropdown menu, and a red box highlights the 'New Draft' button. Red numbers '1.' and '2.' are placed above the dropdown and button respectively.

Required Fields: Date of Plan

1. Choose **Behavior Intervention Plan** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete form and save. *****NOTE:** Statements in the text fields on this screen can be customized by district administrator.

Behavior Intervention Plan (BIP)

There are now 3 Behavior Intervention Plans within SE Manager – Behavior Intervention Plan, Behavior Intervention Plan (BIP), and the Functional Behavior Assessment > Behavior Intervention Plan. This new plan allows users to put in basic information and save allowing the rest of the form to be completed, and each behavior to be entered individually. *****NOTE:** Once a district has determined which BIP they want their staff to utilize, district administrators can "hide" the others in the District Admin>Edit District Customizations screen.

Required Fields: Date of Plan, Behavior Name

1. Choose **Behavior Intervention Plan (BIP)** from the **Student Forms** dropdown menu.
2. Click **New Draft or Edit Draft**.
3. Complete form and save. Each Behavior can be entered and Saved. To add additional behaviors, either click **Add Another Entry** at the bottom of the **Behavior** screen or click the green plus **+** next to **Behavior** at the top. *****NOTE:**
 1) Statements in the text fields on this screen can be customized by district administrator. 2) There is an Edit Customization option that allows districts to be able to enable progress reporting on the bottom of the Behavior Intervention PLAN (BIP) below each goal.

Child Outcome Summary (COS)

This form is to be completed for every child (age 3-5) who is entering/exiting ECSE. The SPP Indicator 7 report displays ratings in the three outcome areas from locked COS forms. (See [SPP Indicator 7](#) for details).

Required Fields: COS Entry Date

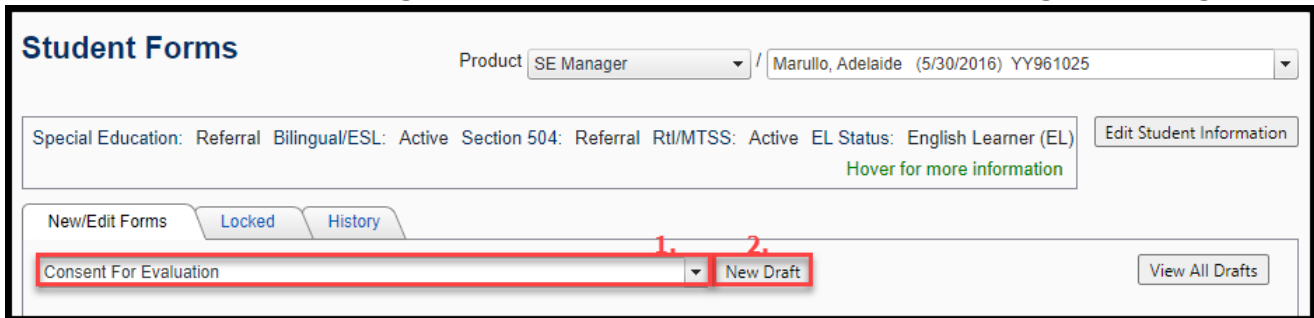
1. Choose **Child Outcome Summary (COS)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **COS Entry Date**. Complete form and save.

*****NOTE:** Although the Date ECSE Services Began is not a required field in the form, if it is not populated, the student will not appear in the SPP Indicator 7 report (for entry) upon lock. In addition, the Date ECSE Services Ended needs to be populated for the student to appear in the SPP Indicator 7 report (for exit) upon lock.

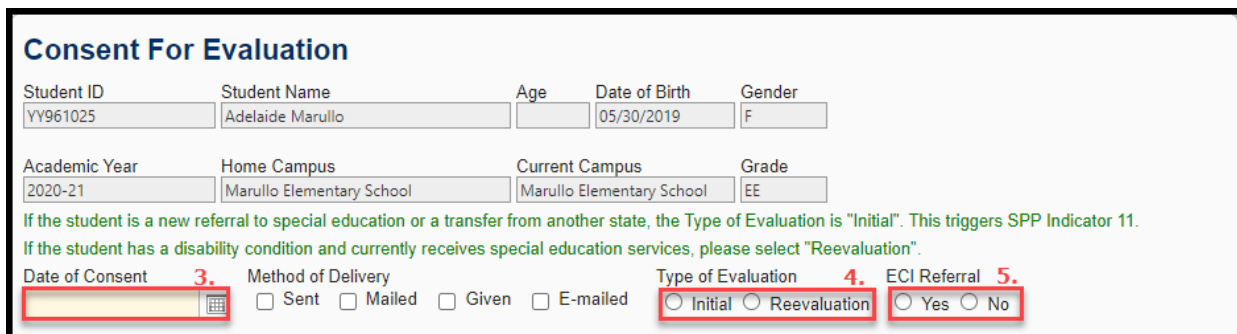
Consent for Evaluation¹

The purpose of this form is to provide prior written notice to the parent and obtain consent when an evaluation has been proposed [ref §300.300(a)(1)(iii)].

Related Forms: Contact Log, Notice of Evaluation, Procedural Safeguards Log



1. Choose **Consent For Evaluation** from the **Student Forms** dropdown menu.
2. Click **New Draft**.



Required Field: Date of Consent, Type of Evaluation, ECI Referral

3. Enter **Date of Consent**. This is the date the consent is sent/provided to parents. ****NOTE:** This date field does not start your timelines, however, in an audit it will be compared to the request for referral date to verify a response to the parent within the 15-day timeline established on the Referral Timelines report.
4. Indicate **Type of Evaluation**. All Initials must be marked Initial to be included as part of SPP Indicator 11 and SPP Indicator 12. *****NOTE:** Students that are an initial referral to special education should have a status of **Referral** on program compliance. All referrals must be marked as Initial on the Consent for Evaluation form as opposed to Re-Evaluation. If Initial is not selected for Transferred (out of state) students, the student will not appear on the correct report. If the student is already receiving special education services, Reevaluation is what should be selected for that student.
5. If the student is under the age of 3, **ECI Referral** will display on the **Consent For Evaluation** form. Click **Yes** if the student is an **ECI Referral**. *****NOTE:** If district has an ECI student they want to pull into Indicator 12, add information to Indicator 12 on Program Compliance and use student's 3rd birthday as the due date if the referral is less than 90 days. Clicking **No** populates SPP Indicator 11.

¹ **Consent for Evaluation** is also located in the SE FIE program, and instructions for completing it can be found in the [SE FIE User Guide](#).

If using the parent signature date as the date of consent for evaluation, select Signature Date.
 If using the date the District received the signed Consent for Evaluation, select Received on.

Signature of Parent/Guardian/Adult Student

Signature Date Received on

Signature of Interpreter, if used

Please return to:

School Staff Person: Campus:

If you have questions, please contact:

School Staff Person: Phone number: Staff Email:

6. Signature Date/Received On

7. Save

6. **Signature Date/Received On:** Enter the date the parent gave consent for the evaluation. ***NOTE: This is the field that updates the SPP Indicator 11 or SPP Indicator 12 fields on Program Compliance once the form has been Saved. This date is the field that triggers the timeline calculations for the Full Initial and Individual Evaluation Due Date and the Initial IEP Meeting Due Date on Program Compliance. If **Received On** displays on the Consent for Evaluation form, the district has a Customization Option that has been enabled via the District Admin > District > Customization Options screen.

7. Click **Save**.

If the district does not use the SuccessEd Consent for Evaluation form to document consent, users will have to manually enter the appropriate information into Program Compliance. (See Support > Special Education > Indicator Information > Popular Questions for SPP 11 for additional information).

Consent For Eval – Parent Declined Eval

Student Forms

Product: SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) Edit Student Information

Hover for more information

New/Edit Forms Locked History

1. Consent For Evaluation 2. New Draft

View All Drafts

1. Choose **Consent For Evaluation** from the **Student Forms** dropdown menu.
2. Click **New Draft**.

3. **Type of Evaluation = Initial.**

4. Parent selected **No** on the statement 'I give my permission for testing'.

5. Upon **Lock** of this form, the program will automatically change the student's status to **Parent Declined Eval** on Program Compliance.

Consent for Release: VI and DB

This form is designed for documenting parent/guardian/adult student consent for the Texas Education Agency to release personally identifiable information.

Related Forms: Contact Log, IEP Meeting, Notice of IEP Meeting, Procedural Safeguards Log, Supplement: Visual Impairment (VI)

Required Field: Date Sent/Mailed/Given/Emailed

1. Choose **Consent for Release: VI and DB** from the **Student Forms** dropdown menu.

2. Click **New Draft**.

3. Enter **Date Sent/Mailed/Given/Emailed**. Complete form and save.

Consent to Transfer Assistive Technology Devices

This form is designed for documenting parent/guardian/adult student consent to transfer AT devices.

Related Forms: Contact Log, IEP Meeting, Notice of IEP Meeting, Procedural Safeguards Log, Supplement: Assistive Technology (AT)

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student ID field 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' dropdown is currently set to 'Consent to Transfer Assistive Technology Devices', with a red box around it and a red '1.' above it. To the right of this dropdown is a 'New Draft' button, with a red box around it and a red '2.' above it. Other buttons include 'Edit Student Information' and 'View All Drafts'.

Required Field: Transferee, Date

1. Choose **Consent to Transfer Assistive Technology Devices** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Transferee** and **Date**. Complete form and save.

Consent: Initial Placement

This form is designed for documenting parental consent for special education and related services. It fulfills the "informed consent" requirements of IDEA by indicating parent has been fully informed, the parent understands and agrees with Committee decisions, and understands consent can be revoked in writing at any time [ref. §300.9, §300.9(a), §300.9(b), §300.9(c)(1)].

Related Forms: Contact Log, IEP Meeting, Notice of IEP Meeting, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student ID field 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' dropdown is currently set to 'Consent: Initial Placement', with a red box around it and a red '1.' above it. To the right of this dropdown is a 'New Draft' button, with a red box around it and a red '2.' above it. Other buttons include 'Edit Student Information' and 'View All Drafts'.

Required Field: IEP Meeting Date

1. Choose **Consent: Initial Placement** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Consent: Psychological Evaluation/Services

This form is designed for documenting parent/guardian/adult student consent for psychological evaluation and/or services.

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student ID field 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' dropdown is currently set to 'Consent: Psychological Evaluation/Services', with a red box around it and a red '1.' above it. To the right of this dropdown is a 'New Draft' button, with a red box around it and a red '2.' above it. Other buttons include 'Edit Student Information' and 'View All Drafts'.

Required Field: Date of Consent

1. Choose **Consent: Psychological Evaluation/Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete form and **Save**. **Date of Consent** will be found on Consent and Signatures page.

Consent: Residential Care Release

This form is designed for documenting parental/guardian consent to release confidential information to a residential care facility and/or related agencies.

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button and a 'Hover for more information' link. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Consent: Residential Care Release' selected. A red box labeled '1.' highlights this dropdown menu. To the right of the dropdown menu is a 'New Draft' button, which is highlighted with a red box labeled '2.'. To the far right of the 'New/Edit Forms' section is a 'View All Drafts' button.

Required Field: Date Sent

1. Choose **Consent: Residential Care Release** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date Sent**. Complete form and save.

Consent: Transition Release

This form is designed for documenting parent/guardian/adult student consent for the school district to disclose confidential information to agencies indicated.

Related Forms: Contact Log, IEP Meeting, Notice of IEP Meeting, Procedural Safeguards Log, Supplement: Transition

The screenshot shows the 'Student Forms' interface, identical in layout to the previous one. The dropdown menu under the 'New/Edit Forms' tab now shows 'Consent: Transition Release' selected. A red box labeled '1.' highlights this dropdown menu. To the right of the dropdown menu is a 'New Draft' button, which is highlighted with a red box labeled '2.'. The 'View All Drafts' button is also visible to the right.

Required Field: Date

1. Choose **Consent: Transition Release** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

Contact Log

The form provides a mechanism to document conversations and attempts to contact parents, adult students, or any other persons who have an educational interest in the student. The form is available in all products in the SE application. Entries created in one product are visible to users of other products in which the student is accessible.

Related Forms: Consents, IEP Meetings, Notices

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are status indicators for 'Special Education: Referral Bilingual/ESL: Active', 'Section 504: Referral RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. A 'New/Edit Forms' section contains 'Locked' and 'History' buttons. A dropdown menu is open, showing 'Contact Log' selected, with a 'New Draft' button next to it. Red boxes and numbers 1 and 2 highlight the dropdown menu and the 'New Draft' button respectively.

1. Choose **Contact Log** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete form as needed.

Decline Alternative Placement Services

Related Forms: IEP Meetings, Notices

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are status indicators for 'Special Education: Referral Bilingual/ESL: Active', 'Section 504: Referral RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. A 'New/Edit Forms' section contains 'Locked' and 'History' buttons. A dropdown menu is open, showing 'Decline Alternative Placement Services' selected, with a 'New Draft' button next to it. Red boxes and numbers 1 and 2 highlight the dropdown menu and the 'New Draft' button respectively.

Required Fields: IEP Meeting Date, Parent 1

1. Choose **Decline Alternative Placement Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **Parent 1**. Complete form and save.

Decline Special Education Services

***NOTE: This form should not be locked as part of a form set; locking the form individually is what triggers the status change to **Parent Refusal**.

Related Forms: IEP Meetings, Notices

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are status indicators for 'Special Education: Referral Bilingual/ESL: Active', 'Section 504: Referral RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. A 'New/Edit Forms' section contains 'Locked' and 'History' buttons. A dropdown menu is open, showing 'Decline Special Education Services' selected, with a 'New Draft' button next to it. Red boxes and numbers 1 and 2 highlight the dropdown menu and the 'New Draft' button respectively.

Required Fields: IEP Meeting Date, Parent 1

1. Choose **Decline Special Education Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **Parent 1**. Complete form and save.

To whom it may concern:
 This is to certify that special education services were offered to Adelaide as documented in the IEP Meeting form. We hereby decline such services.

Signature of Parent/Guardian/Adult Student _____ Signature Date **3.**

-- Select --

- Upon lock of this form, the student's status on Program Compliance will automatically change to **Parent Refusal** and the date entered into the Signature Date field will become the Services Start Date on Program Compliance.

Eligibility Transportation

This form is used to document the recommendation for transportation once the Full and Individual Evaluation has indicated a need for transportation as a related service.

Related Forms: Full and Individual Evaluation, Notice of IEP Meeting, IEP Meetings, Transportation Information

Student Forms Product: SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral Rt/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms Locked History

Eligibility: Transportation **1.** **2.** New Draft [View All Drafts](#)

Required Fields: IEP Meeting Date

- Choose **Eligibility: Transportation** from the **Student Forms** dropdown menu.
- Click **New Draft**.
- Enter **IEP Meeting Date**. Complete form and save.

Extended School Year (ESY) Information

This form is used to document emergency contact information and pick-up/drop-off locations for ESY.

Related Forms: Notice of IEP Meeting, IEP Meetings, Supplement: Extended School Year (ESY), Transportation Information

Student Forms Product: SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral Rt/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms Locked History

Extended School Year (ESY) Information **1.** **2.** New Draft [View All Drafts](#)

Required Fields: Meeting Date

- Choose **Extended School Year (ESY) Information** from the **Student Forms** dropdown menu.
- Click **New Draft**.

3. Enter **Meeting Date**. Complete form and save.

Functional Behavioral Assessment (FBA)

This form provides the ability to complete an in-depth analysis of a student's behavior and should only be utilized if a signed Consent for Evaluation form has been obtained. If the student will not be formally assessed or if the analysis is simply a review of existing data, utilize the Functional Behavioral Review form instead. As deemed appropriate for the student, the FBA includes the option to complete a Behavior Intervention Plan. On draft of this sub-form, data from the FBA is pulled into the BIP. Additionally, behavior goals that have been drafted or are already in effect (locked) can be linked to the FBA. In subsequent drafts, the user can access and edit the BIP after reviewing the FBA. If no changes to the FBA are needed, click the checkbox at the bottom of the title page to prevent the form from printing along with the BIP.

Related Forms: Annual Goals, Contact Log, IEP Meeting, Notice of IEP Meeting, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are status indicators for Special Education, Bilingual/ESL, Section 504, RtI/MTSS, and EL Status. A 'New/Edit Forms' section contains tabs for 'Locked' and 'History'. A dropdown menu is open, showing 'Functional Behavioral Assessment (FBA)' selected, with a red box and a '1.' label. To the right of the dropdown is a 'New Draft' button, also highlighted with a red box and a '2.' label. A 'View All Drafts' button is visible on the right side.

Required Fields: Date of Assessment

1. Choose **Functional Behavioral Assessment (FBA)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Assessment**. Complete form and save.

Functional Behavioral Review

This form can be used as an FBA if consent to evaluate has been obtained. Indicating consent by clicking Yes, will change the title of the printed form.

Related Forms: Consent for Evaluation, Functional Behavioral Assessment (FBA)

The screenshot shows the 'Student Forms' interface, similar to the previous one. The dropdown menu is open, showing 'Functional Behavioral Review' selected, with a red box and a '1.' label. The 'New Draft' button is highlighted with a red box and a '2.' label. The 'View All Drafts' button is also visible.

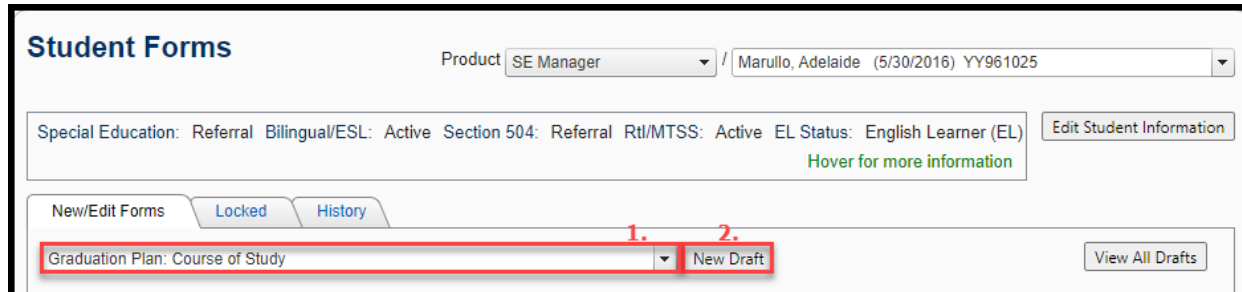
Required Fields: Date of Review

1. Choose **Functional Behavioral Review** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Review**. Complete form and save.

Graduation Plan: Course of Study

This form is used to help map out a student's high school courses to be used by the IEP Committee to create Annual Goals that support reaching post-secondary goals and to discuss transition services which may be needed to help reach those goals.

Related Forms: Notice of IEP Meeting, IEP Meeting, Supplement: Graduation with Foundations, Supplement: Transition



The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of student information: 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral Rt/MTSS: Active EL Status: English Learner (EL)'. To the right of this row is an 'Edit Student Information' button and a 'Hover for more information' link. Below the student information, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Graduation Plan: Course of Study' selected. A red box highlights the dropdown menu, with a red '1.' above it. To the right of the dropdown is a 'New Draft' button, which is also highlighted with a red box and a red '2.' above it. A 'View All Drafts' button is located to the right of the 'New Draft' button.

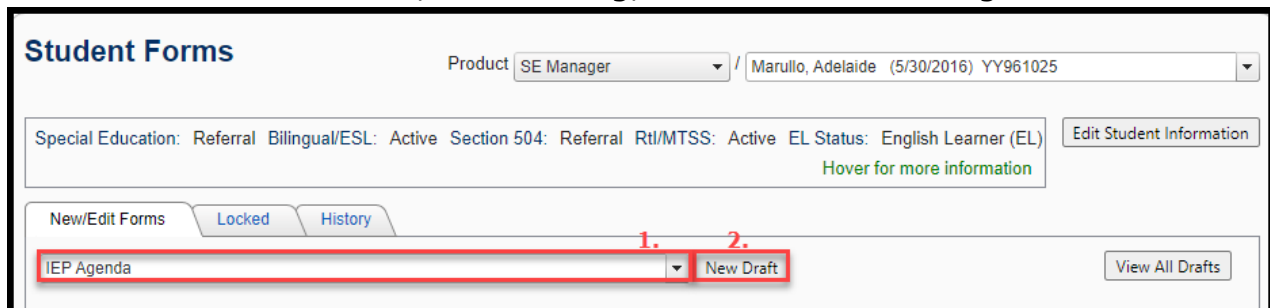
Required Fields: Date of Last Review

1. Choose **Graduation Plan: Course of Study** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Last Review**. Complete form and save.

IEP Agenda

This form provides an outline of the IEP meeting, including the order in which topics are to be addressed and any additional forms to be utilized based on unique characteristics of the student. For example, if a student has a condition of Autism, Auditory Impairment, Visual Impairment, and/or Deaf-Blindness, the respective supplements are provided as line items on the agenda. Notations are also made for students who are LEP or of transition age.

Related Forms: Annual Goals, IEP Meeting, Notice of IEP Meeting



The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of student information: 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral Rt/MTSS: Active EL Status: English Learner (EL)'. To the right of this row is an 'Edit Student Information' button and a 'Hover for more information' link. Below the student information, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'IEP Agenda' selected. A red box highlights the dropdown menu, with a red '1.' above it. To the right of the dropdown is a 'New Draft' button, which is also highlighted with a red box and a red '2.' above it. A 'View All Drafts' button is located to the right of the 'New Draft' button.

Required Fields: Date of Meeting

1. Choose **IEP Agenda** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Meeting**. Complete form and save.

Incident Report: Restraint or Time-out

Completion of this form allows for accurate reporting to PEIMS regarding student restraints. Parent letters are auto generated based on data entered on the incident report form.

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms Locked History

Incident Report: Restraint or Time-out **1.** **New Draft** **2.** [View All Drafts](#)

Required Fields: Incident Date, Incident Time, Parent 1 Name, The student was involved in the following action

1. Choose **Incident Report: Restraint or Time-out** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Incident Date, Incident Time, Parent 1 Name,** and **The student was involved in the following action.** Complete form and save.

Medical Exception STAAR Alt 2 and TELPAS Alternate

Completion of this form documents eligibility and the committee’s decision for a medical exception for students unable to participate in state assessments.

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Active Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: 1 - Identified as EB [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms Locked History

Medical Exception STAAR Alt 2 and TELPAS Alternate **1.** **New Draft** **2.** [View All Drafts](#)

Required Fields: IEP Meeting Date, Applicable Testing Year

1. Choose **Medical Exception STAAR Alt 2 and TELPAS Alternate** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **Applicable Testing Year.** Complete form and save.

No Authentic Academic Response STAAR Alternate 2 and TELPAS Alternate

Completion of this form allows the ARD committee (and LPAC, if applicable) to document that a student meets eligibility criteria for a NAAR designation and cannot meaningfully respond to academic tasks during instruction and assessment.

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Active Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: 1 - Identified as EB [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms **Locked** History

No Authentic Academic Response STAAR Alternate 2 and TELPAS Alternate **1.** **New Draft** **2.** [View All Drafts](#)

Required Fields: IEP Meeting Date, Applicable Testing Year

1. Choose **No Authentic Academic Response STAAR Alternate 2 and TELPAS Alternate** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **Applicable Testing Year**. Complete form and save.

Notice of Decision: Prior Written Notice

The district must provide prior written notice before it:

- Proposes or refuses to initiate or change the identification of the child,
- Proposes or refuses to initiate or change the evaluation of the child,
- Proposes or refuses to initiate or change the educational placement of the child,
- Proposes or refuses to initiate or change the provision of FAPE to the child, or
- Ceases the provision of special education and related services due to the parent’s revocation of consent for services.

The district must provide prior written notice at least five school days before proposing or refusing the action unless the parent agrees to a shorter time frame [ref. 34 C.F.R. 300; 19 T.A.C. Chapter 89].

Related Forms: Contact Log, Procedural Safeguards Log

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms **Locked** History

Notice of Decision: Prior Written Notice **1.** **New Draft** **2.** [View All Drafts](#)

Required Field: Date

1. Choose **Notice of Decision: Prior Written Notice** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

***NOTE: Statements in shared lists can be customized by district administrator.

Notice of Evaluation²

The district must provide prior written notice before it:

- Proposes or refuses to initiate or change the identification of the child,
- Proposes or refuses to initiate or change the evaluation of the child.

The district must provide prior written notice at least five school days before proposing or refusing the action unless the parent agrees to a shorter time frame. [ref. 34 C.F.R. 300; 19 T.A.C. Chapter 89].

Related Forms: Consent for Evaluation, Contact Log, Procedural Safeguards Log

Student Forms

Product: SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral Rt/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms Locked History

Notice of Evaluation **1.** New Draft **2.** View All Drafts

1. Select **Notice of Evaluation** from the **New/Edit Forms** dropdown.
2. Click **New Draft** to open the form.

Notice of Evaluation

Student ID	Student Name	Age	Date of Birth	Gender
YY961025	Adelaide Marullo	4	05/30/2016	F

Academic Year	Home Campus	Current Campus	Grade
2020-21	Marullo Elementary School	Marullo Elementary School	KG

If the student is a new referral to special education, select Yes below and input the date the referral was received, if known. Select Not Applicable for reevaluations.

The district received a request to evaluate the student for *initial* special education eligibility on **3.**

Yes Not Applicable

If Yes, the student was referred for a special education evaluation by: If other **4.**

If the student is a new referral to special education or a transfer from another state, the Type of Evaluation is "Initial".
If the student has a disability condition and currently receives special education services, please select "Reevaluation".

Date of Notice	Method of Delivery	Type of Evaluation
<input type="text" value="5/1/2021"/> 5.	<input type="checkbox"/> Sent <input type="checkbox"/> Mailed <input type="checkbox"/> Given <input type="checkbox"/> E-mailed	<input checked="" type="radio"/> Initial <input type="radio"/> Reevaluation 6.

Required Field: Date of Notice, Type of Evaluation

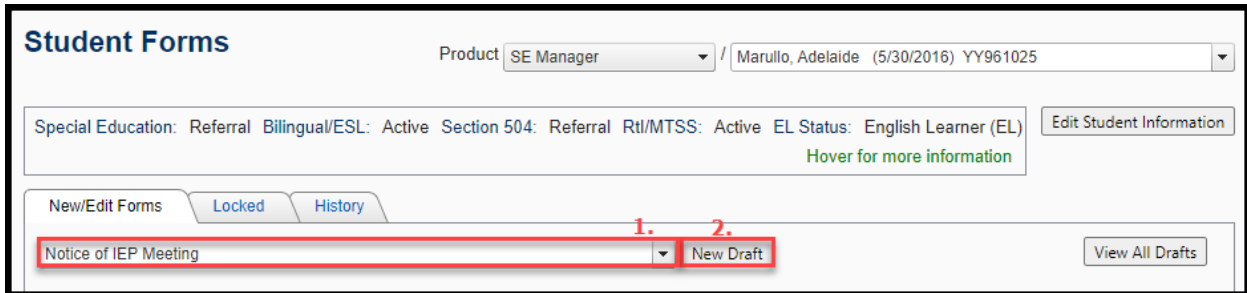
3. Enter the date the district received a request to evaluate the student and click the appropriate Yes/Not Applicable statement. *****NOTE:** Upon save of the Notice of Evaluation form, this information will automatically pull into Program Compliance which is required for Indicator 11 reporting.
4. Indicate who made the referral to evaluate the student (e.g., parent, school, or other). *****NOTE:** Upon save of the Notice of Evaluation form, this information will automatically pull into Program Compliance which is required for Indicator 11 reporting.
5. Enter in **Date of Notice**.
6. Click the **Type of Evaluation** (e.g., Initial or Reevaluation). Complete form and save.

² **Notice of Evaluation** is located in the SE Manager and SE FIE programs; instructions for completing the form can be found in the [SE FIE User Guide](#).

Notice of IEP Meeting

This form is designed for parent notification of an upcoming IEP meeting and should be sent with the Parent Response form. It fulfills the notice requirements of IDEA by indicating the purpose, time, location, and proposed attendees, and also allows for the parent to indicate if they would like the Part C service coordinator or representative if the child has been previously served under Part C [ref. §300.322(a), §300.321(f)]. If the parent does not respond to your initial attempt, the user can complete the Second Notice. The Friendly Reminder was created as a helpful tool to send home just prior to the meeting. In addition, users can utilize the Contact Log to document attempts to invite the parents [ref. §300.322(d)].

Related Forms: Contact Log, IEP Meeting, Procedural Safeguards Log



The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Notice of IEP Meeting' selected, and a 'New Draft' button next to it. A red box highlights the dropdown menu and the 'New Draft' button, with a red '1.' pointing to the dropdown and a red '2.' pointing to the 'New Draft' button. To the right of the dropdown menu is a 'View All Drafts' button.

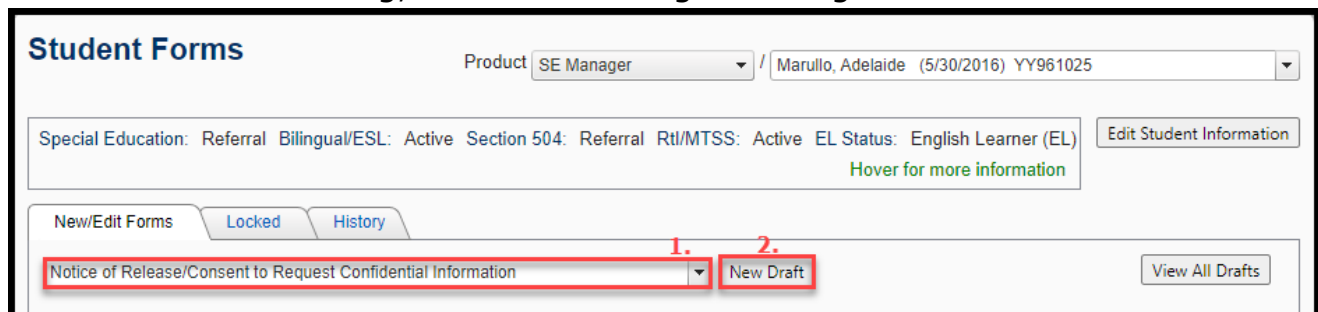
Required Field: Date of Notice, Parent 1, Meeting Date, Meeting Time

1. Choose **Notice of IEP Meeting** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Notice, Parent 1, Meeting Date, and Meeting Time**. Complete form and save.

Notice of Release/Consent to Request Confidential Information

This form is designed for releasing or requesting confidential information about the student. It fulfills the confidentiality requirements of IDEA by listing the records that will be released and to whom [ref. §300.9(b)].

Related Forms: Contact Log, Procedural Safeguards Log



The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Notice of Release/Consent to Request Confidential Information' selected, and a 'New Draft' button next to it. A red box highlights the dropdown menu and the 'New Draft' button, with a red '1.' pointing to the dropdown and a red '2.' pointing to the 'New Draft' button. To the right of the dropdown menu is a 'View All Drafts' button.

Required Field: Date Sent

1. Choose **Notice of Release/Consent to Request Confidential Information** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date Sent**. Complete form and save.

Notice of Service Plan Meeting

This form is designed for parent notification of an upcoming Service Plan meeting and should be sent with the Parent Response form. It fulfills the notice requirements of IDEA by indicating the purpose, time, location, and proposed attendees, and also allows for the parent to indicate if they would like the Part C

service coordinator or representative if the child has been previously served under Part C [ref. §300.322(a), §300.321(f)]. If the parent does not respond to your initial attempt, the user can complete the Second Notice. The Friendly Reminder was created as a helpful tool to send home just prior to the meeting. In addition, users can utilize the Contact Log to document attempts to invite the parents [ref. §300.322(d)].

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Notice of Service Plan Meeting' selected. To the right of the dropdown is a 'New Draft' button. A 'View All Drafts' button is also visible. The interface includes status information for Special Education, Bilingual/ESL, Section 504, RtI/MTSS, and EL Status (English Learner (EL)).

Required Field: Date of Notice, Parent 1, Meeting Date, Meeting Time

1. Choose **Notice of Service Plan Meeting** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Notice, Parent 1, Meeting Date, and Meeting Time**. Complete form and save.

Notice to Parent of Rights Transferred

This form is designed for documenting the transfer of rights to the adult student upon reaching 18 years of age [ref. §300.520(a)].

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Notice to Parent of Rights Transferred' selected. To the right of the dropdown is a 'New Draft' button. A 'View All Drafts' button is also visible. The interface includes status information for Special Education, Bilingual/ESL, Section 504, RtI/MTSS, and EL Status (English Learner (EL)).

Required Field: Date of Notice, Parent 1 Name

1. Choose **Notice to Parent of Rights Transferred** from the **Student Forms** dropdown menu. *****NOTE:** Upon Save of the title page, the program will add an additional section titled **Notice to Student of Transfer of Rights**
2. Click **New Draft**.
3. Enter **Date of Notice** and **Parent 1 Name**. Complete form and save.

Notice to Parent of Transfer of Rights

This form is designed for documenting the transfer of rights to the adult student [ref. §300.320(c)].

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, a dropdown menu is open, showing 'Notice to Parent of Transfer of Rights' selected. A red box highlights this dropdown menu with a '1.' next to it. To the right of the dropdown menu is a 'New Draft' button, which is also highlighted with a red box and a '2.' next to it. At the bottom right of the form selection area is a 'View All Drafts' button.

Required Field: Date of Notice, Parent 1 Name

1. Choose **Notice to Parent of Transfer of Rights** from the **Student Forms** dropdown menu. *****NOTE:** Upon Save of the title page, the program will add an additional section titled **Notice to Student of Rights Transferred**.
2. Click **New Draft**.
3. Enter **Date of Notice** and **Parent 1 Name**. Complete form and save.

Notice to the Parent to Release Information for SHARS

This form is designed to obtain consent and document parental notification to release SHARS information for Medicaid billing purposes. This form is provided annually.

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, a dropdown menu is open, showing 'Notice to the Parent to Release Information for SHARS' selected. A red box highlights this dropdown menu with a '1.' next to it. To the right of the dropdown menu is a 'New Draft' button, which is also highlighted with a red box and a '2.' next to it. At the bottom right of the form selection area is a 'View All Drafts' button.

Required Field: Date

1. Choose **Notice to the Parent to Release Information for SHARS** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**.
4. Once the **Notice to the Parent to Release Information for SHARS** form has been saved, users will then see the **Consent to Release Information for SHARS** form.

*****NOTE:** Information from this form will pull into the SHARS Consent and Notification report. The **Date** field on the **Notice to the Parent to Release Information for SHARS** form is what pulls into the **SHARS Notification** field in the report. The **Signature Date** on the **Consent to Release Information for SHARS** form is what pulls into the **SHARS Consent** field in the report. These fields can be entered manually into the students' Program Compliance screen.

Notice: Parent Revocation of Special Education Services

This form is designed to document parent revocation of special education services [ref. §300.300(b)(4)(i)].

***NOTE: This form should not be locked as part of a form set; locking the form individually is what triggers the status change to **Parent Revoc**.

Related Forms: Contact Log, Procedural Safeguards Log

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is a button labeled 'Edit Student Information' and a link 'Hover for more information'. Below the status indicators, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. In the 'New/Edit Forms' section, a dropdown menu is open, showing 'Notice: Parent Revocation of Special Education Services' selected. A red box highlights this dropdown menu, with a '1.' above it. To the right of the dropdown menu is a 'New Draft' button, with a red box around it and a '2.' above it. At the bottom right of the 'New/Edit Forms' section is a 'View All Drafts' button.

Required Field: Date of Parent Revocation

1. Choose **Notice: Parent Revocation of Special Education Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Parent Revocation**. Complete form and save.
4. Upon **Lock** of this form, the program will automatically change the student's status to **Parent Revoc** on Program Compliance and the date entered into the **Date special education services will cease** field will become the Services Start Date and the Date Left SpED on Program Compliance.

Parent/Guardian Acknowledgement

***NOTE: Districts can utilize this form to document parent acknowledgement of paperwork received.

The screenshot shows the 'Student Forms' interface, similar to the previous one. The 'Product' dropdown is 'SE Manager' and the student identifier is 'Marullo, Adelaide (5/30/2016) YY961025'. The status indicators are the same. The 'New/Edit Forms' section has tabs for 'New/Edit Forms', 'Locked', and 'History'. The dropdown menu is open, showing 'Parent/Guardian Acknowledgement' selected. A red box highlights this dropdown menu, with a '1.' above it. To the right of the dropdown menu is a 'New Draft' button, with a red box around it and a '2.' above it. At the bottom right of the 'New/Edit Forms' section is a 'View All Drafts' button.

Required Fields: Date sent

1. Choose **Parent/Guardian Acknowledgement** from the **Student Forms** dropdown menu.
2. Click **New Draft**. Complete form and save.

Parent-Directed Special Education Services (PDSES)

Required Fields: IEP Meeting Date

1. Choose **Parent-Directed Special Education Services (PDSES)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Active Bilingual/ESL: Active Section 504: Active RtI/MTSS: Active EL Status: Emergent Bilingual (EB)/English Learner (EL)
[Hover for more information](#)

[Edit Student Information](#)

New/Edit Forms Locked History

Parent-Directed Special Education Services (PDSSES) 1. New Draft 2. [View All Drafts](#)

Physician’s Referral/Prescription for OT Services

This form is designed to document the doctor’s referral/prescription for OT services and how long the referral is valid for (e.g., 3 years), when referral begins and when it ends.

***NOTE: Therapeutic Recommendations, Options in the valid for dropdown and the Physician’s Name dropdown can be customized by district administrators.

Related Forms: Contact Log, Procedural Safeguards Log, Consent for Evaluation, Full and Individual Evaluation, IEP Meeting, Notice for Evaluation, Notice of IEP Meeting

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Active Bilingual/ESL: Active Section 504: Active RtI/MTSS: Active EL Status: Emergent Bilingual (EB)/English Learner (EL)
[Hover for more information](#)

[Edit Student Information](#)

New/Edit Forms Locked History

Physician's Referral/Prescription for OT Services 1. New Draft 2. [View All Drafts](#)

Required Fields: Date, Referral begins on, Referral Ends on

1. Choose **Physician’s Referral/Prescription for OT Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter the **Date**, Referral begins, Referral ends. Complete form and save.

Physician’s Referral/Prescription for PT Services

This form is designed to document the doctor’s referral/prescription for PT services and how long the referral is valid for (e.g., 3 years), when referral begins and when it ends.

***NOTE: Therapeutic Recommendations, Options in the valid for dropdown and the Physician’s Name dropdown can be customized by district administrators.

Related Forms: Contact Log, Procedural Safeguards Log, Consent for Evaluation, Full and Individual Evaluation, IEP Meeting, Notice for Evaluation, Notice of IEP Meeting

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Active Bilingual/ESL: Active Section 504: Active RtI/MTSS: Active EL Status: Emergent Bilingual (EB)/English Learner (EL) [Hover for more information](#)

[Edit Student Information](#)

New/Edit Forms Locked History

Physician's Referral/Prescription for PT Services **1.** **New Draft** **2.** [View All Drafts](#)

Required Fields: Date, Referral begins on, Referral Ends on

1. Choose **Physician's Referral/Prescription for PT Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter the **Date**, Referral begins, Referral ends. Complete form and save.

Physician's Information

***NOTE: Discussion of this form should be included for homebound and school health purposes.

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Hover for more information](#)

[Edit Student Information](#)

New/Edit Forms Locked History

Physician's Information **1.** **New Draft** **2.** [View All Drafts](#)

Required Fields: Date requested by district

1. Choose **Physician's Information** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date requested by district**. Complete form and save.

Physician's Release from Homebound

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Hover for more information](#)

[Edit Student Information](#)

New/Edit Forms Locked History

Physician's Release from Homebound **1.** **New Draft** **2.** [View All Drafts](#)

Required Fields: Date Received by District Personnel

1. Choose **Physician's Release from Homebound** from the **Student Forms** dropdown menu.
2. Click **New Draft**.

3. Enter **Date Received by District Personnel**. Complete form and save.

Procedural Safeguards Log

Related Forms: Contact Log, Consent for Evaluation, Full and Individual Evaluation, IEP Meeting, Notice for Evaluation, Notice of IEP Meeting

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Procedural Safeguards Log' selected, and a 'New Draft' button next to it. A red box highlights the dropdown menu, and a red arrow points to the 'New Draft' button. The number '1.' is placed above the dropdown menu, and the number '2.' is placed above the 'New Draft' button. To the right of the dropdown menu and button is a 'View All Drafts' button.

1. Choose **Procedural Safeguards Log** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete form and save.

Receipt of TSBVI Information

Related Forms: Notice of IEP Meeting, IEP Meeting

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Receipt of TSBVI Information' selected, and a 'New Draft' button next to it. A red box highlights the dropdown menu, and a red arrow points to the 'New Draft' button. The number '1.' is placed above the dropdown menu, and the number '2.' is placed above the 'New Draft' button. To the right of the dropdown menu and button is a 'View All Drafts' button.

Required Fields: IEP Meeting Date

1. Choose **Receipt of TSBVI Information** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Receipt of TSD Information

Related Forms: Notice of IEP Meeting, IEP Meeting

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Receipt of TSD Information' selected, and a 'New Draft' button next to it. A red box highlights the dropdown menu, and a red arrow points to the 'New Draft' button. The number '1.' is placed above the dropdown menu, and the number '2.' is placed above the 'New Draft' button. To the right of the dropdown menu and button is a 'View All Drafts' button.

Required Fields: IEP Meeting Date

1. Choose **Receipt of TSD Information** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Request For Records

Related Forms: IEP Meetings, Full and Individual Evaluation, Disability Reports

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student ID field 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators is a 'New/Edit Forms' section with 'Locked' and 'History' tabs. The 'New/Edit Forms' section contains a dropdown menu with 'Request For Records' selected, a 'New Draft' button, and a 'View All Drafts' button. Red boxes and numbers '1.' and '2.' highlight the dropdown menu and the 'New Draft' button, respectively.

Required Fields: IEP Meeting Date, Parent 1

1. Choose **Request For Records** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **Parent 1**. Complete form and save.

Residential Facility Tracker Information

Related Forms: Notice of IEP Meeting, IEP Meeting

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student ID field 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators is a 'New/Edit Forms' section with 'Locked' and 'History' tabs. The 'New/Edit Forms' section contains a dropdown menu with 'Residential Facility Tracker Information' selected, a 'New Draft' button, and a 'View All Drafts' button. Red boxes and numbers '1.' and '2.' highlight the dropdown menu and the 'New Draft' button, respectively.

Required Fields: Date

1. Choose **Residential Facility Tracker Information** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

Review of Existing Evaluation Data (REED)

For districts also licensing SE FIE, there is REED form within the SE FIE program as well. The REED form is not shared across the SE Manager and SE FIE programs. After this form is locked, the data can be imported into the title page of a Full and Individual Evaluation report form.

Related Forms: Consent for Evaluation, Full and Individual Evaluation, IEP Meeting, Notice for Evaluation, Notice of IEP Meeting, Procedural Safeguards Log

Required Fields: Meeting Date

1. Choose **Review of Existing Evaluation Data (REED)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Meeting Date**. Complete form and save.

Speech Therapist Referral for Speech and Language Therapy Services

Related Forms: Contact Log, Procedural Safeguards Log, Consent for Evaluation, Full and Individual Evaluation, IEP Meeting, Notice for Evaluation, Notice of IEP Meeting

Required Fields: Date, Referral begins on, Referral Ends on

1. Choose **Speech Therapist Referral for Speech and Language Therapy Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Evaluation Type** and **Location**. Complete form and save.

STAAR Alternate 2 Participation Requirements

*****NOTE*****: The STAAR Alternate 2 Participation Requirements and TELPAS Alternate Participation Requirements have been combined into one form to streamline completion. The green on-screen guidance will indicate the students EL Status, where to go if changes need to be made, and what the program will do when the 'Include TELPAS Alternate Participation Requirements' box is checked.

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student information dropdown for 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, showing a dropdown menu with 'STAAR Alternate 2 Participation Requirements' selected. A red box labeled '1.' highlights this dropdown, and another red box labeled '2.' highlights the 'New Draft' button next to it. A 'View All Drafts' button is also visible.

Required Fields: IEP Meeting Date, Applicable Testing Year

1. Choose **STAAR Alternate 2 Participation Requirements** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date, Applicable Testing Year**, and check the box for **Include TELPAS Alternate Participation Requirements** if student will be taking TELPAS. Complete form and save.

Summary Report: Special Education/Related Services

***NOTE: Shared lists on form can be customized by the district. The Reason for Referral and Summary of Interpretation text boxes are rich text format fields which will allow users to copy and paste an image directly into the textbox.

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student information dropdown for 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, showing a dropdown menu with 'Summary Report: Special Education/Related Services' selected. A red box labeled '1.' highlights this dropdown, and another red box labeled '2.' highlights the 'New Draft' button next to it. A 'View All Drafts' button is also visible.

Required Fields: Date of Report, Report Name

1. Choose **Summary Report: Special Education/Related Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date of Report** and **Report Name**. Complete form and save.

Supplement: Assistive Technology (AT)

***NOTE: Shared lists on form can be customized by the district.

The screenshot shows the 'Student Forms' interface. At the top, there is a 'Product' dropdown set to 'SE Manager' and a student information dropdown for 'Marullo, Adelaide (5/30/2016) YY961025'. Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, showing a dropdown menu with 'Supplement: Assistive Technology (AT)' selected. A red box labeled '1.' highlights this dropdown, and another red box labeled '2.' highlights the 'New Draft' button next to it. A 'View All Drafts' button is also visible.

Required Fields: Date

1. Choose **Supplement: Assistive Technology (AT)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

Supplement: Autism

This form should be addressed at least once yearly (e.g., with the Annual IEP) for students with a condition of Autism. ***NOTE: Shared lists on form can be customized by district.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Supplement: Autism' selected, and a 'New Draft' button next to it. Red boxes and numbers 1 and 2 highlight the dropdown menu and the 'New Draft' button, respectively. A 'View All Drafts' button is also visible on the right side of the interface.

Required Fields: Date

1. Choose **Supplement: Autism** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

Supplement: Communication Needs (DHH)

***NOTE: Shared lists on form can be customized by the district.

The screenshot shows the 'Student Forms' interface, similar to the previous one. The 'Product' dropdown is 'SE Manager' and the student identifier is 'Marullo, Adelaide (5/30/2016) YY961025'. The status indicators are the same. The 'New/Edit Forms' tab is active, and the dropdown menu shows 'Supplement: Communication Needs (DHH)' selected. The 'New Draft' button is highlighted with a red box and the number 2. The number 1 is placed above the dropdown menu. A 'View All Drafts' button is also visible on the right side of the interface.

Required Fields: IEP Meeting Date

1. Choose **Supplement: Communication Needs (DHH)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supplement: Compensatory Services

This form can be used for Referral compensatory services and compensatory services based on a denial of FAPE agreed upon by the LEA and the parent. ***NOTE: If a claim was triggered, this information will be reported on the SPP Indicator 11 report as well as on the Compensatory Services report. Those with a claim indicated will be on the SPP Indicator report and the other will not.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open showing 'Supplement: Compensatory Services' selected. A red box highlights this dropdown, with a red '1.' next to it. To the right of the dropdown is a 'New Draft' button, also highlighted with a red box and a red '2.'. Other elements include 'Special Education: Referral Bilingual/ESL: Active', 'Section 504: Referral RtI/MTSS: Active', 'EL Status: English Learner (EL)', and an 'Edit Student Information' button.

Required Fields: IEP Meeting Date

1. Choose **Supplement: Compensatory Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supplement: COVID-19 Special Education Recovery Act

This form can be used to address and comply with SB 89.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2008) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open showing 'Supplement: COVID-19 Special Education Recovery Act' selected. A red box highlights this dropdown, with a red '1.' next to it. To the right of the dropdown is a 'New Draft' button, also highlighted with a red box and a red '2.'. Other elements include 'Special Education: Active', 'Bilingual/ESL: Active', 'Section 504: Active', 'RtI/MTSS: Active', 'EL Status: English Learner (EL)', and an 'Edit Student Information' button.

Required Fields: IEP Meeting Date

1. Choose **Supplement: COVID-19 Special Education Recovery Act** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supplement: Extended School Year (ESY)

This form should be utilized when extended year services are being considered for a student. *****NOTE:** Students Annual Goals will pull into the 'Based on evidence present above...' text box which can be selected as goals to be worked on during ESY.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open showing 'Supplement: Extended School Year (ESY)' selected. A red box highlights this dropdown, with a red '1.' next to it. To the right of the dropdown is a 'New Draft' button, also highlighted with a red box and a red '2.'. Other elements include 'Special Education: Referral Bilingual/ESL: Active', 'Section 504: Referral RtI/MTSS: Active', 'EL Status: English Learner (EL)', and an 'Edit Student Information' button.

Required Fields: Date

1. Choose **Supplement: Extended School Year (ESY)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.

3. Enter **Date**. Complete form and save.

Supplement: Failure Review

***NOTE: Refer to local operating guidelines regarding use of this form.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open, showing 'Supplement: Failure Review' selected. A red box highlights the dropdown menu, with a red '1.' above it. Another red box highlights the 'New Draft' button, with a red '2.' above it. A 'View All Drafts' button is visible on the right.

Required Fields: Date

1. Choose **Supplement: Failure Review** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

Supplement: Graduation with Foundations

***NOTE: Shared lists on form can be customized by district. This form Graduation information is compiled for all graduating seniors and their endorsements.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open, showing 'Supplement: Graduation with Foundations' selected. A red box highlights the dropdown menu, with a red '1.' above it. Another red box highlights the 'New Draft' button, with a red '2.' above it. A 'View All Drafts' button is visible on the right.

Required Fields: IEP Meeting Date

1. Choose **Supplement: Graduation** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supplement: Language Proficiency Assessment Committee (LPAC)

For districts also licensing ELLA, this form is pre-populated with decisions made by the LPAC and documented on a locked ELL Plan. ***NOTE: Shared lists on form can be customized by district.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. The 'New/Edit Forms' tab is active, and a dropdown menu is open, showing 'Supplement: Language Proficiency Assessment Committee (LPAC)' selected. A red box highlights the dropdown menu, with a red '1.' above it. Another red box highlights the 'New Draft' button, with a red '2.' above it. A 'View All Drafts' button is visible on the right.

Required Fields: IEP Meeting Date, LPAC Meeting Date

1. Choose **Supplement: Language Proficiency Assessment Committee (LPAC)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **LPAC Meeting Date**. Complete form and save.

Supplement: Manifestation Determination Review

***NOTE: Shared lists on form can be customized by district.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a status bar with 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' and an 'Edit Student Information' button. A 'Hover for more information' link is also present. The main navigation area includes 'New/Edit Forms', 'Locked', and 'History' tabs. A dropdown menu is open, showing 'Supplement: Manifestation Determination Review' (highlighted with a red box and labeled '1.') and a 'New Draft' button (highlighted with a red box and labeled '2.'). A 'View All Drafts' button is located at the bottom right.

Required Fields: Meeting Date

1. Choose **Supplement: Manifestation Determination Review** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Meeting Date**. Complete form and save.

Supplement: Medically Fragile

This form should be utilized when the Medically Fragile button is triggered on Section IIF of the IEP Meeting forms. The justification requirements for the PEIMS 163 indicators are included in the supplement.

The screenshot shows the 'Student Forms' interface, similar to the previous one. The 'Product' dropdown is 'SE Manager' and the student identifier is 'Marullo, Adelaide (5/30/2016) YY961025'. The status bar shows 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' and an 'Edit Student Information' button. The main navigation area includes 'New/Edit Forms', 'Locked', and 'History' tabs. A dropdown menu is open, showing 'Supplement: Medically Fragile' (highlighted with a red box and labeled '1.') and a 'New Draft' button (highlighted with a red box and labeled '2.'). A 'View All Drafts' button is located at the bottom right.

Required Fields: Meeting Date

1. Choose **Supplement: Medically Fragile** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Meeting Date**. Complete form and save.

Supplement: Out of District Placement

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button and a 'Hover for more information' link. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Supplement: Out of District Placement' selected, and a 'New Draft' button next to it. A 'View All Drafts' button is also visible on the right side of the interface.

Required Fields: IEP Meeting Date

1. Choose **Supplement: Out of District Placement** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supplement: Personal Care Services

It is highly recommended this form be utilized if the district seeks reimbursement for personal care services. *****NOTE:** 1) Shared lists on form can be customized by district. 2) Personal Care Services time should be documented in Section IV. Determination of Services to Be Provided page of the IEP Meeting form. This will enable staff to track PCS by students on the Class List by Subject or Related Services by Service report. 3) The Supplement: Personal Care Services form can be run in bulk by Campus and Grade through the Teacher Bundle report.

The screenshot shows the 'Student Forms' interface, similar to the previous one. The 'Product' dropdown is 'SE Manager' and the student ID is 'Marullo, Adelaide (5/30/2016) YY961025'. The status indicators are the same. The 'New/Edit Forms' tab is active, and the dropdown menu now shows 'Supplement: Personal Care Services' selected. The 'New Draft' button is still present next to the dropdown. The 'View All Drafts' button is also visible.

Required Fields: IEP Meeting Date

1. Choose **Supplement: Personal Care Services** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supplement: Referral to RDSPD

The screenshot shows the 'Student Forms' interface. The 'Product' dropdown is 'SE Manager' and the student ID is 'Marullo, Adelaide (5/30/2016) YY961025'. The status indicators are the same. The 'New/Edit Forms' tab is active, and the dropdown menu now shows 'Supplement: Referral to RDSPD' selected. The 'New Draft' button is still present next to the dropdown. The 'View All Drafts' button is also visible.

Required Fields: Meeting Date, The ARD committee has determined that this student's placement will be, Regional Day School Program, School District

1. Choose **Supplement: Referral to RDSPD** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Meeting Date, The ARD Committee has determined that this student's placement will be, Regional Day School Program, and School District**. Complete form and save.

Supplement: Transition

This form should be utilized as a means to document a coordinated set of activities based on the child's strengths, preferences, and interests [ref. §300.43(a)]. Under state law this form should be addressed not later than when the child reaches 14 years of age [ref. §89.1055(h)].

***NOTE: 1) Shared lists on form can be customized by district. 2) Upon Save of the Supplement: Transition form, an additional form title SPP Indicator 13: Folder Review will display and can be completed throughout the year.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of status indicators: 'Special Education: Referral Bilingual/ESL: Active', 'Section 504: Referral RtI/MTSS: Active', and 'EL Status: English Learner (EL)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu for 'Supplement: Transition' which is highlighted with a red box and labeled '1.'. To the right of this dropdown is a 'New Draft' button, also highlighted with a red box and labeled '2.'. To the far right of this section is a 'View All Drafts' button.

Required Fields: Date and Folder Review Date

1. Choose **Supplement: Transition** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date** and **Folder Review Date**. Complete form and save.

Supplement: Visual Impairment (VI)

The screenshot shows the 'Student Forms' interface, similar to the previous one. The 'Product' dropdown is 'SE Manager' and the student ID is 'Marullo, Adelaide (5/30/2016) YY961025'. The status indicators are the same. The 'New/Edit Forms' tab is active, and the dropdown menu is set to 'Supplement: Visual Impairment (VI)', which is highlighted with a red box and labeled '1.'. The 'New Draft' button is highlighted with a red box and labeled '2.'. The 'View All Drafts' button is also present.

Required Fields: IEP Meeting Date

1. Choose **Supplement: Visual Impairment (VI)** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Supporting Documents

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there is a row of student status information: 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)'. To the right of this information is an 'Edit Student Information' button and a link that says 'Hover for more information'. Below the status information are three tabs: 'New/Edit Forms', 'Locked', and 'History'. Under the 'New/Edit Forms' tab, there is a dropdown menu with 'Supporting Documents' selected, and a 'New Draft' button next to it. A red box highlights the dropdown menu, and a red arrow labeled '1.' points to it. Another red box highlights the 'New Draft' button, and a red arrow labeled '2.' points to it. A 'View All Drafts' button is located to the right of the 'New Draft' button.

Required Fields: Form Title, Date

1. Choose **Supporting Documents** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Form Title and Date**. Complete form and save.

Surrogate Parent

The screenshot shows the 'Student Forms' interface, identical to the one above. In this instance, the dropdown menu under the 'New/Edit Forms' tab has 'Surrogate Parent' selected. A red box highlights the dropdown menu, and a red arrow labeled '1.' points to it. Another red box highlights the 'New Draft' button, and a red arrow labeled '2.' points to it. A 'View All Drafts' button is located to the right of the 'New Draft' button.

Required Fields: Date Received

1. Choose **Surrogate Parent** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date Received**. Complete form and save.

TELPAS Alternate Participation Requirements

***NOTE: The STAAR Alternate 2 Participation Requirements and TELPAS Alternate Participation Requirements have been combined into one form to streamline completion. The green on-screen guidance has been built into the title page which indicates the form should be completed for students in 2nd grade if applicable and that STAAR Alt 2 should be completed for students in 3rd – 12th if applicable.

The screenshot shows the 'Student Forms' interface, identical to the ones above. In this instance, the dropdown menu under the 'New/Edit Forms' tab has 'TELPAS Alternate Participation Requirements' selected. A red box highlights the dropdown menu, and a red arrow labeled '1.' points to it. Another red box highlights the 'New / Edit' button next to it, and a red arrow labeled '2.' points to it. A 'View All Drafts' button is located to the right of the 'New / Edit' button.

Required Fields: IEP Meeting Date, Applicable Testing Year

1. Choose **TELPAS Alternate Participation Requirements** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date** and **Applicable Testing Year**. Complete form and save.

Transition: Coordinated Set of Activities

The purpose of this form is to document the activities needed to facilitate the student's movement from school to post-school activities [ref. §300.43(b), §89.1055(g), §89.1055(g)(1), §89.1055(g)(2), §89.1055(g)(3), §89.1055(g)(4), §89.1055(g)(5), §89.1055(g)(6), §89.1055(g)(7), §89.1055(g)(8)].
***NOTE: 1) Shared lists on form can be customized by district. 2) Fields from this form will pull into the Transition: Summary of Performance form. (See [Transition: Summary of Performance](#) for more information).

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Transition: Coordinated Set of Activities' selected. A red box highlights this dropdown menu with a '1.' next to it. To the right of the dropdown is a 'New Draft' button, which is also highlighted with a red box and a '2.' next to it. Other elements include 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' and an 'Edit Student Information' button.

Required Fields: IEP Meeting Date

1. Choose **Transition: Coordinated Set of Activities** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **IEP Meeting Date**. Complete form and save.

Transition: Follow-Up Assessment

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Transition: Follow-Up Assessment' selected. A red box highlights this dropdown menu with a '1.' next to it. To the right of the dropdown is a 'New Draft' button, which is also highlighted with a red box and a '2.' next to it. Other elements include 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' and an 'Edit Student Information' button.

Required Fields: Date

1. Choose **Transition: Follow-Up Assessment** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Date**. Complete form and save.

Transition: Parent Survey

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Transition: Parent Survey' selected. A red box highlights this dropdown menu with a '1.' next to it. To the right of the dropdown is a 'New Draft' button, which is also highlighted with a red box and a '2.' next to it. Other elements include 'Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL)' and an 'Edit Student Information' button.

1. Choose **Transition: Parent Survey** from the **Student Forms** dropdown menu.
2. Click **New Draft**.

3. Complete form and save.

Transition: SPP Indicator 13 Folder Review

***NOTE: This is the same form that is included as the additional form in the Supplement: Transition form. This form will allow staff to review the folders as they are locked and then again when the team does the folder review for Indicator 13. The last form locked will display in the SPP: Indicator 13 report in the event more than one was completed.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Transition: SPP Indicator 13 Folder Review' selected, with a red box around it and a red '1.' next to it. To the right of the dropdown is a 'New Draft' button, also with a red box around it and a red '2.' next to it. A 'View All Drafts' button is visible on the right side of the interface.

Required Fields: Folder Review Date

1. Choose **Transition: SPP Indicator 13 Folder Review** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Folder Review Date**. Complete form and save.

Transition: Student Interview

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Adelaide (5/30/2016) YY961025). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu is open, showing 'Transition: Student Interview' selected, with a red box around it and a red '1.' next to it. To the right of the dropdown is a 'New Draft' button, also with a red box around it and a red '2.' next to it. A 'View All Drafts' button is visible on the right side of the interface.

Required Fields: Interview Date


1. Choose **Transition: Student Interview** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Interview Date**. Complete form and save.

Transition: Summary of Performance

***NOTE: If changes need to be made to the Transition: Summary of Performance form, the change must be entered into the original form the data is pulling from (e.g., IEP Meeting > Section I, Section II, Section III, Section IV, Supplement: Graduation with Foundations, Supplement: Transition, Transition: Coordinated Set of Activities forms).

1. Choose **Transition: Summary of Performance** from the **Student Forms** dropdown menu.
2. Click **New Draft**.

Required Field(s): Date of Last Review, Date of Graduation/Exit, Date of Last IEP Meeting, Date of Last Evaluation. The majority of the information found on this form is populated from fields found in the IEP meeting form and related supplements. If any information needs to be corrected or updated, edit the respective form and then return to the **Transition: Summary of Performance** form to resave the edited information.

1. **Student Information:** Data pulls from Demographics and Enrollment fields.
2. **Date of Last Review:** Enter either by typing it into the box using MM/DD/YYYY format, or by choosing the date from the calendar button next to the box .
3. **Date of Graduation/Exit:** Date pulls from the form **Supplement: Graduation with Foundations > Anticipated Date of Graduation** field.
4. **Date of Last IEP Meeting:** Date pulls from the form **Individualized Education Program meeting > Title Page > Meeting Date** field.
5. **Date of Last Evaluation:** Date pulls from **Individualized Education Program meeting > Section I. Review of Evaluation Data > Current Date** field.

6. **My Disability Condition(s):** Data pulls from **Individualized Education Program meeting > Section II. Determination of Eligibility > Condition 1, Condition 2, Condition 3** fields.

Impact (Present Levels of Academic Achievement and Functional Performance)

Physical
 Can participate in the state physical fitness assessment without restrictions
 Capable of receiving instruction in regular physical education with no accommodation and/or modifications
 Good general health **7.**

Behavioral
 Able to follow classroom rules
 Able to follow student code of conduct
 Completes tasks
 Cooperative
 Interacts appropriately with adults
 Interacts appropriately with peers
 Respects authority
 Respects personal space **8.**

Discipline
 Able to follow the Student Code of Conduct without accommodations or modifications **9.**

Functional
 Student's functional skills are within normal limits. **10.**

Academic
 Enter strengths and weaknesses here. **11.**

- 7. **Physical:** Data pulls from the form **Individualized Education Program** meeting > **Section III. Present Levels of Academic Achievement and Functional Performance** > **Physical** field.
- 8. **Behavioral:** Data pulls from the form **Individualized Education Program** meeting > **Section III. Present Levels of Academic Achievement and Functional Performance** > **Behavioral** field.
- 9. **Discipline:** Data pulls from the form **Individualized Education Program** meeting > **Section III. Present Levels of Academic Achievement and Functional Performance** > **Discipline** field.
- 10. **Functional:** Data pulls from the form **Individualized Education Program** meeting > **Section III. Present Levels of Academic Achievement and Functional Performance** > **Functional** field.
- 11. **Academic:** Data pulls from the form **Individualized Education Program** meeting > **Section III. Present Levels of Academic Achievement and Functional Performance** > **Academic** field.

Supports that Worked for Me

Accommodation	Subjects
Clarification or rewording of complex questions and concepts using definitions, similies and literal language, etc.	English, Math, Science, Social Studies
Preview text before reading to activate prior knowledge, draw conclusions and set a purpose for reading	English, Math, Science, Social Studies

12.

- 12. **Accommodations:** Data pulls from the form **Individualized Education Program** meeting > **Section IV. Determination of Services to Be Provided** > **Accommodations/Modifications** field.

Goals for After High School	
Training	13.
Education	14.
Employment	15.
Independent Living Skills (where appropriate)	16.


- 13. **Training:** Data pulls from the form **Supplement: Transition > Training** field.
- 14. **Education:** Data pulls from the form **Supplement: Transition > Education** field.
- 15. **Employment:** Data pulls from the form **Supplement: Transition > Employment** field.
- 16. **Independent Living Skills (where appropriate):** Data pulls from the form **Supplement: Transition > Independent Living Skills** field.

Activities/Services to Facilitate Movement to Post-School Activities	
Instruction	17.
Related Services	18.
Community Experiences	19.
Development of Employment and Other Post-School/Adult Living Objectives	20.
Acquisition of Daily Living Skills (if applicable)	21.
Functional Vocational Assessment (if applicable)	22.
Other Activities (if applicable)	23.

- 17. **Instruction:** Data pulls from the form **Transition: Coordinated Set of Activities – Instruction** field.
- 18. **Related Services:** Data pulls from the form **Transition: Coordinated Set of Activities > Related Services** field.
- 19. **Community Experiences:** Data pulls from the form **Transition: Coordinated Set of Activities > Community Experiences** field.

20. **Development of Employment and Other Post-School/Adult Living Objectives:** Data pulls from the form **Transition: Coordinated Set of Activities > Development of Employment and Other Post-School/Adult Living Objectives** field.
21. **Acquisition of Daily Living Skills (if applicable):** Data pulls from the form **Transition: Coordinated Set of Activities > Acquisition of Daily Living Skills (if applicable)** field.
22. **Functional Vocational Assessment (if applicable):** Data pulls from the form **Transition: Coordinated Set of Activities > Functional Vocational Assessment (if applicable)** field.
23. **Other Activities (if applicable):** Data pulls from the form **Transition: Coordinated Set of Activities > Other Activities (if applicable)** field.

The screenshot shows a form interface. On the left, there are two text input fields. The top one is labeled 'Parent Information' and is highlighted with a red box and the number '24.'. The bottom one is labeled 'Student Information' and is highlighted with a red box and the number '25.'. On the right side of the form, there is a 'Save' button highlighted with a red box and the number '26.'. Above the 'Save' button, the text 'Additional Comments' is visible.

24. **Parent Information:** Enter information provided by parent.
25. **Student Information:** Enter information provided by student.
26. Clicking **Save** will save the form and automatically scroll user back up to list of forms which indicates the data on form has been saved. If there are any errors in the form, a red minus symbol  will appear next to the field that needs to be corrected, and under **Save** there will be an error message that says **See validation errors above**.

Transition: Teacher Survey

***NOTE: Shared lists on form can be customized by district.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student identifier (Marullo, Gabby (7/4/2009) YY9876120SM). Below this, there is a row of status indicators: 'Special Education: Referral', 'Bilingual/ESL: Active', 'Section 504: Referral', 'Rtl/MTSS: Active', and 'EL Status: English Proficient (EP)'. To the right of these indicators is an 'Edit Student Information' button. Below the status indicators, there are three tabs: 'New/Edit Forms', 'Locked', and 'History'. At the bottom, there is a dropdown menu showing 'Transition: Teacher Survey' (highlighted with a red box and the number '1.') and a 'New Draft' button (highlighted with a red box and the number '2.'). To the right of the 'New Draft' button is a 'View All Drafts' button.

1. Choose **Transition: Teacher Survey** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Complete form and save.

Transportation Information

This form is to be completed for any student who is provided transportation as a related service. When completed at a student's annual IEP meeting, it is recommended a form be completed for each school year in which the service is to be provided (e.g., Current 4/21/2026

Year, Next Year, Both or ESY) and if the student is to receive extended school year services.

Related Forms: Contact Log, Eligibility: Transportation, IEP Meeting, Notice of IEP Meeting, Procedural Safeguards Log

Product: SE Manager / Marullo, Gabby (7/4/2009) YY9876120SM

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Proficient (EP) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms **Locked** History

Transportation Information **1.** **2.** New Draft [View All Drafts](#)

Required Fields: Services Start Date, Services School Year

1. Choose **Transportation Information** from the **Student Forms** dropdown menu.
2. Click **New Draft**.
3. Enter **Services Start Date** and **Services School Year**. Complete form and save.

Locking a Single Form

Product: SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

New/Edit Forms **Locked** History

-- Select -- [New / Edit](#) **1.** [View All Drafts](#)

Draft Forms: (5) [Print/Lock Form Set](#)

Section Name	Last Edit
Annual Goals From 5/3/2021 to 5/2/2022	7/13/2021 2:55:33 PM by Stephanie Marullo RM
Contact Log 7/18/2021	7/18/2021 3:52:18 PM by Stephanie Marullo
Individualized Education Program Meeting 5/3/2021 - Annual	7/18/2021 3:48:42 PM by Stephanie Marullo
2. Notice of IEP Meeting 5/3/2021	7/18/2021 3:50:28 PM by Stephanie Marullo
Supporting Documents Dyslexia Evaluation 5/3/2021	7/18/2021 3:51:49 PM by Stephanie Marullo

1. Click **View All Drafts** on the **Student Forms** screen to display all SE Manager forms currently in draft for the student.
2. Click on draft form to be locked.

Draft Forms: Notice of IEP Meeting (1)

Select version to print: [Print/PDF](#) **3.** [Lock](#) *Note: No further edits will be possible after locking this form*

Section Name	Last Edit	
+ Notice of IEP Meeting 5/1/2020 *	8/4/2020 12:44:52 PM by Stephanie RM Marullo	Delete
+ Parent Response	8/4/2020 12:44:52 PM by Stephanie RM Marullo	Delete
+ Second Notice		
+ Friendly Reminder		

3. Click **Lock**. The locked web form will appear on the **Locked** tab, and a PDF of the form will display on the **History** tab. *****NOTE:** 1) It is recommended that forms be printed from the History tab. 2) Upon lock of the IEP Meeting forms, a PEIMS 163 Summary Sheet will be created as the first few pages of the printed meeting/form set.

Print/Lock Form Set

***NOTE: Annual Goals can no longer be locked as part of an IEP Meeting Form Set and must be locked as a separate form.

The screenshot shows the 'Student Forms' interface for a student named Marullo, Adelaide. It displays a list of draft forms under the 'Draft Forms: (5)' section. A red box highlights the 'Print/Lock Form Set' button. Another red box highlights the 'View All Drafts' button. A third red box highlights the 'Annual Goals From 5/3/2021 to 5/2/2022' form in the list. A fourth red box highlights the 'Individualized Education Program Meeting 5/3/2021 - Annual' form in the list.

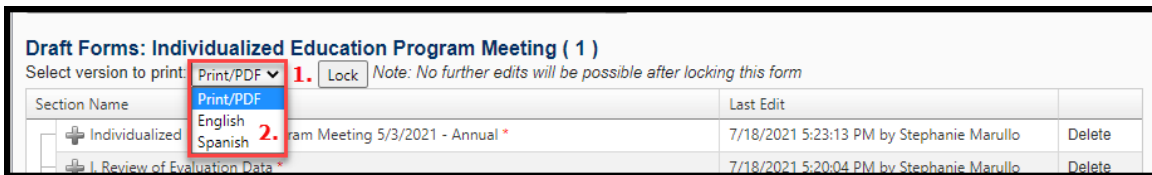
Section Name	Last Edit
Annual Goals From 5/3/2021 to 5/2/2022	7/13/2021 2:55:33 PM by Stephanie Marullo RM
Contact Log 7/18/2021	7/18/2021 3:52:18 PM by Stephanie Marullo
Individualized Education Program Meeting 5/3/2021 - Annual	7/18/2021 3:48:42 PM by Stephanie Marullo
Notice of IEP Meeting 5/3/2021	7/18/2021 3:50:28 PM by Stephanie Marullo
Supporting Documents Dyslexia Evaluation 5/3/2021	7/18/2021 3:51:49 PM by Stephanie Marullo

1. Click **View All Drafts** on the **Student Forms** screen to display all SE Manager forms currently in draft for the student.
2. Review the list of forms currently in Draft. Any forms that are not needed can be deleted from this screen.
3. Click **Print/Lock Form Set** from this screen to print and/or lock draft forms with an IEP meeting form.

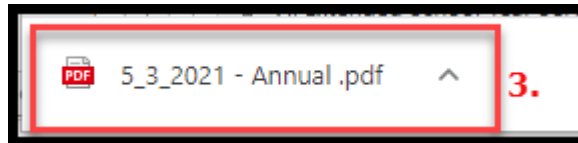
The screenshot shows the 'Print/Lock Draft Form Set' dialog box. It has a title bar 'Print/Lock Draft Form Set' and a 'Select Master Form:' dropdown menu set to 'Individualized Education Program Meeting'. Below this, there are instructions: 'Forms print/lock in the order listed with the Master Form printing first. Clicking either > or < will move the selected from to the desired column. Clicking either >> or << will move all forms to the desired column.' There are two columns: 'Draft forms' and 'Forms to be included in the printed/locked set'. The 'Draft forms' column contains 'Contact Log 7/18/2021', 'Notice of IEP Meeting 5/3/2021', and 'Supporting Documents Dyslexia Evaluation 5/3/2021'. The 'Forms to be included in the printed/locked set' column is empty. Between the columns are navigation buttons: '>', '<', '>>', and '<<'. At the bottom, there is a 'Language to Print' dropdown set to 'English', and 'Print' and 'Lock' buttons.

4. The **Master Form** will be the draft meeting form (e.g., Amendment, Brief, IEP, Service Plan, Transfer).
5. Select the **Draft Forms** to be included in the form set.
6. Move the forms to the right using > or >>.
7. Click **Language to Print** to preview draft form set.
8. Click **Print** to print the draft form set.
9. Click **Lock** to lock the form set. ***NOTE: 1) It is recommended that forms be printed from the History tab. 2) Upon lock of the IEP Meeting forms, a PEIMS 163 Summary Sheet will be created as the first few pages of the printed meeting/form set.

Printing Draft Forms



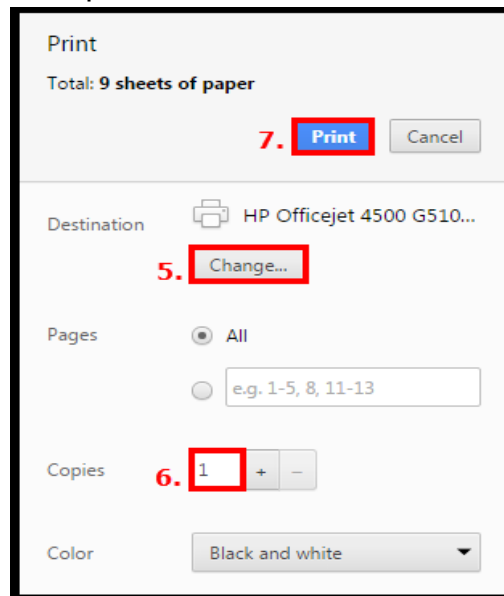
1. Within the Student Forms screen, click the **Print/PDF** dropdown.
2. Select the desired language. All documents are available in English. When Spanish is available, it will display in the dropdown.



3. In the Google Chrome browser, a PDF icon will display on the screen. To open the PDF, click the PDF icon.



4. Once the PDF has opened, hover towards the top of the screen and a new sub-menu will display, click the printer icon to **Print**.



5. Choose the **Printer**.
6. Choose the number of **Copies**.
7. Click **Print**.

Locked Tab

***NOTE: 1) This tab provides a location for District Admins to unlock forms and is for administrative use only. 2) If the form was locked as a part of a form set, when that form is selected in the Locked tab, the entire form set will display to be viewed and/or printed. 3) The Locked tab is specific to the product the user has selected.

Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

[New/Edit Forms](#) **Locked** [History](#)

Marullo, Adelaide
 Select the desired form to view. All documents will be included when viewing or printing the PDF of a locked Form Set.

Section Name	Last Edit
Amendment to the Individualized Education Program (IEP) Amendment Date: 5/3/2021	5/21/2021 5:10:48 PM by Stephanie Guerra Marullo
Annual Goals (13)	
From 1/25/2019 to 1/24/2020	1/27/2019 12:34:21 PM by Stephanie Marullo RM
Brief Individualized Education Program (IEP) (10)	
5/7/2020	5/7/2020 8:31:57 AM by Stephanie Marullo
9/2/2020	8/16/2020 5:54:31 PM by Stephanie Marullo RM
Consent For Evaluation 10/9/2017	1/27/2019 12:20:16 PM by Stephanie Marullo RM
Consent: Initial Placement 6/19/2018	1/27/2019 12:20:16 PM by Stephanie Marullo RM
Individualized Education Program Meeting (2)	
10/1/2017 - Annual	11/3/2017 9:07:34 AM by Stephanie Guerra Marullo
2/1/2018 - Annual	2/1/2018 2:24:38 PM by Stephanie Guerra Marullo

History Tab

***NOTE: Only users with **Deleter [District]** as a user role will see the delete button  and be able to delete items from the History tab.







Student Forms Product SE Manager / Marullo, Adelaide (5/30/2016) YY961025

Special Education: Referral Bilingual/ESL: Active Section 504: Referral RtI/MTSS: Active EL Status: English Learner (EL) [Edit Student Information](#)
[Hover for more information](#)

[New/Edit Forms](#) [Locked](#) **History**

Click the desired recipient in the Send To dropdown below. An email with a student-specific link will be generated for distribution to the appropriate person(s). [Send To](#)

2020-21 2019-20 2018-19 2017-18 2016-17 2015-16 **Prior Years**

Program > Form Type	Last Edit	Delete
Special Education		
Amendment to the Individualized Education Program (IEP)		
5. Amendment Date: 5/3/2021	6. 5/21/2021 5:10:50 PM by Stephanie Guerra Marullo	
Brief Individualized Education Program (IEP)		
3/17/2021	3/17/2021 10:52:21 AM by Stephanie Guerra Marullo	
9/2/2020 Form Set : Brief Individualized Education Program (IEP)	8/16/2020 5:54:37 PM by Stephanie Marullo RM	
Notice: Parent Revocation of Special Education Services		
7/18/2021	7/18/2021 12:34:34 PM by Stephanie Marullo	
Service Plan Meeting		
3/19/2021 - Annual	3/19/2021 12:58:08 PM by Stephanie Guerra Marullo	
Supplement: Transition		
5/18/2021	6/24/2021 10:38:26 AM by Stephanie Guerra Marullo	
Transportation Information		

1. The **History** tab displays documents from all programs in PDF format. This is the information sent when districts request or send student records via the SuccessEd transfer process.

- Send To:** Gives user the option of sending an email to Teachers letting them know one of their assigned students has updated information or to Parent/Guardian, who agreed to receive electronic access to student records, there are updated documents to review. Teachers must have a login for the SuccessEd application and have the student(s) rostered to them via the District Admin tab. See the SE Admin User Guide for more information.
- 2021-22:** Forms locked during the 2022-23 school year are found in the **2022-23** tab. ***NOTE: All forms locked in subsequent school years will be located in their respective school year tabs
- Prior Years:** All forms locked prior to the 2015-16 school year are found in the **Prior Years** tab, along with migrated PDFs from the legacy system.
- Form name will be visible under **Special Education > [Form Name]** in the **History** tab. ***NOTE: To print form from History, click on the date for the form to be printed.
- Last Edit:** Date, time, and username stamp for when the form was added to the History tab.

Uploading Documents to History Tab

***NOTE: Files uploaded to Student History should not exceed 10MB. Allowable files include Word, Excel, MP3, MP4, PDF.

The screenshot shows the 'Student Forms' interface for a student named Marullo, Adelaide (5/30/2016) YY961025. The 'History' tab is selected, showing a list of forms with columns for Program, Form Type, Last Edit, and Delete. Below the list, the 'Upload a New Document' section is visible, with a 'Document Description' field containing '05/30/2021', a 'Choose File' button, and an 'Upload' button. The 'Uploaded Documents' grid at the bottom shows a document with description '05/30/2021' and date '7/10/2021 4:16:07 PM by Stephanie Marullo RM'.

- Click on the **History** tab for the student to which document needs to be uploaded.
- Enter the **Document Description** (this is the title that will display under **Description** in the **Uploaded Documents** grid). ***NOTE: When entering a name into this field, utilize the naming convention of MMDDYY to efficiently locate uploaded documents.
- Click **Choose File** to find document to be uploaded to the History tab.

- Once document has been located, name will display to the right of the **Choose File** button.
- Click **Upload**.
- Uploaded document will display under the **Uploaded Documents** header.
- Date Uploaded:** Date, time, and username stamp for when the form was uploaded to the History tab.

Unable to Add or Edit Draft Forms

If the user is unable to add, edit, or lock a form, check the student's status on Program Compliance to ensure student has an active status (e.g., Active, Initial, Transferred, Private/Home, Referral). The application does not allow a user to change an inactive student's record. Contact your district administrator if changes need to be made.

The screenshot shows the 'Student Forms' interface. At the top, there are dropdown menus for 'Product' (SE Manager) and a student ID (Marullo, Rosco (5/30/2011) SM05302006). Below this, there are tabs for 'New/Edit Forms', 'Locked', and 'History'. A dropdown menu for 'Individualized Education Program Meeting' is highlighted with a red box and labeled '1.'. The 'New/Edit' button is highlighted with a red box and labeled '2.'. A message box is displayed: 'Student is in an inactive status. You cannot create a new draft for an inactive student.' This message is highlighted with a red box and labeled '3.'. Below the message, there is a table for 'Draft Forms: Individualized Education Program Meeting (0)' with columns for 'Section Name' and 'Last Edit'. The table shows that the student does not have any draft forms of this type.

- Select form **New/Edit Forms** dropdown.
- Click **New/Edit** to load form.
- If student does not have an Active status, program will display a message when user hovers over **New/Edit** button.

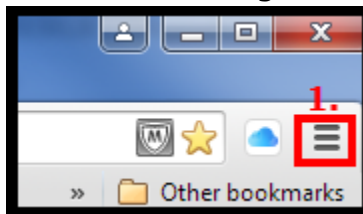
The screenshot shows a meeting invitation form. The text reads: 'We would like to invite you to attend an Individualized Education Program (IEP) Meeting to discuss educational programming for Rosco. We encourage you to attend this meeting as your involvement is an important part of Rosco's education. If graduation is being discussed, it is a change of placement and, upon graduation a student is no longer eligible for services under IDEA and graduation with a regular high school diploma terminates entitlement to the foundation schools program benefits.' Below the text, there are four input fields: 'Meeting Date' (5/3/2021), 'Meeting Time' (9:00 AM), 'Meeting Location' (SE Elementary), and 'Room #'. The 'Meeting Date', 'Meeting Time', and 'Meeting Location' fields are greyed out and highlighted with a red box and labeled '4.'. The 'Room #' field is also highlighted with a red box and labeled '4.'.

- If fields within selected form are greyed out and information can no longer be entered into document, verify student's status on Program Compliance. If the student's status is an active one, the user needs to verify roles through district administrator to ensure they do not have Read-Only access.

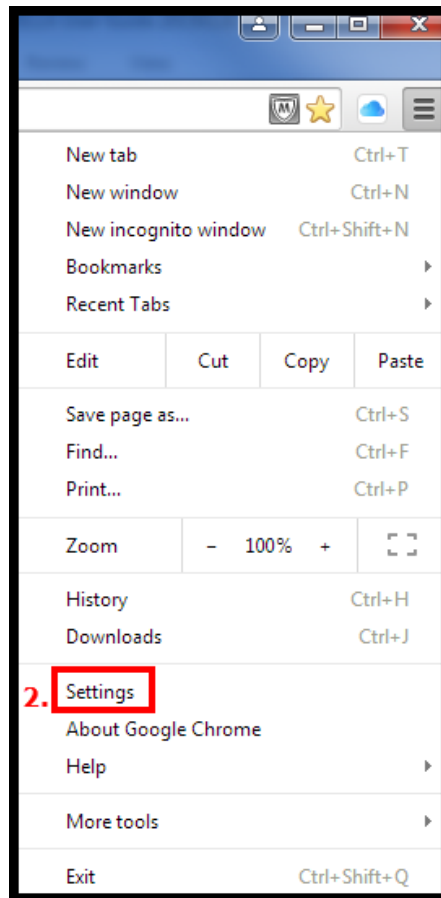
Clearing the Cache

The cache is simply a place on the computer's hard disk where web browsers store items downloaded and there may be times when it's necessary to clear it (i.e., when having difficulty printing).

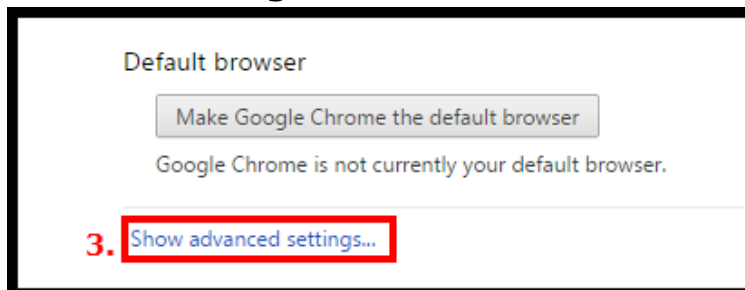
***NOTE: The steps shown below are for clearing the cache in Chrome.



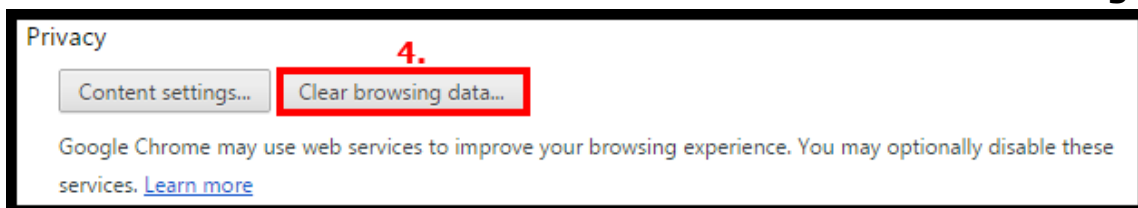
- In the top right corner of the screen, just under the red X, click the icon that looks like three horizontal bars.



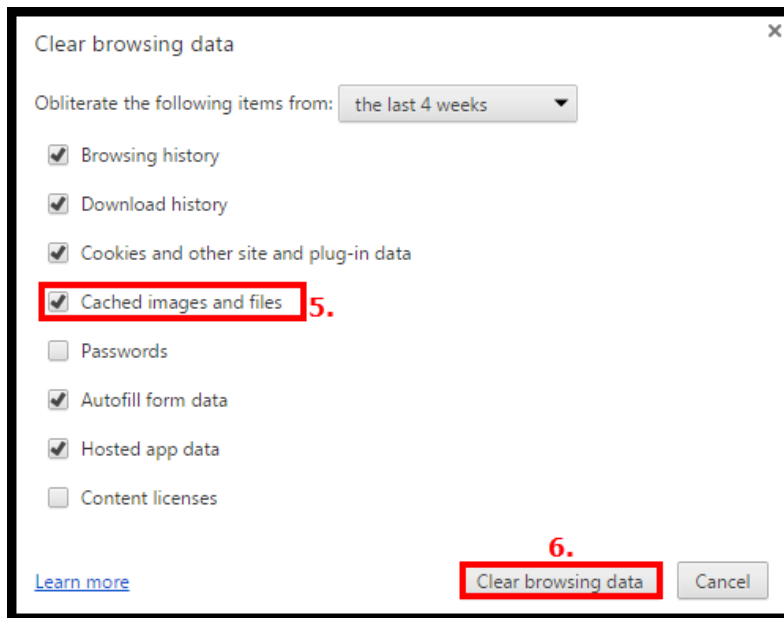
2. Scroll down and click on **Settings**.



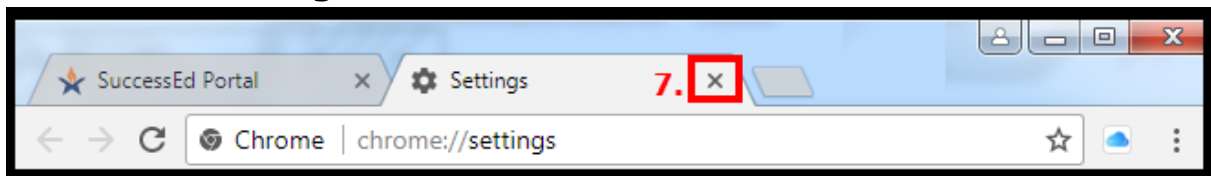
3. Scroll to the bottom of the screen and click on **Show advanced settings....**



4. Scroll down to **Privacy** and click on **Clear browsing data....**



5. Ensure that **Cached images and files** is checked (and anything else to be cleared).
6. Click **Clear browsing data**.



7. Close the **Settings** page by clicking on the x to right within the tab. *****Caution:** Clicking the red X to the far right of the screen will close the entire browser.

Appendix A: List of Forms in SE Manager New/Edit Forms dropdown

Form Name
Accelerated Education Plan
Accelerated Plan/Intensive Program of Instruction
Accept Alternative Placement Services
Administrative Discipline Plan
Amendment to the Individualized Education Program (IEP)
Annual Goals
Behavior Intervention Plan
Behavior Intervention Plan (BIP)
Brief Individualized Education Program (IEP)
Child Outcome Summary (COS)
Consent for Evaluation
Consent for Release: VI and DB
Consent to Transfer Assistive Technology Devices
Consent: Deaf-Blind Census Release
Consent: Initial Placement
Consent: Psychological Evaluation/Services
Consent: Residential Care Release
Consent: Transition Release
Contact Log
Decline Alternative Placement Services
Decline Special Education Services
Eligibility: Transportation
Extended School Year (ESY) Information
Functional Behavioral Assessment (FBA) <ul style="list-style-type: none"> • Behavior Intervention Plan • Replacement Behavior Goals
Functional Behavioral Review
Graduation Plan: Course of Study
IEP Agenda
Incident Report: Restraint or Time-Out <ul style="list-style-type: none"> • Parent Letter
Individualized Education Program Meeting
Medical Exception STAAR Alt 2 and TELPAS Alternate
No Authentic Academic Response STAAR Alternate 2 and TELPAS Alternate
Notice of Decision: Prior Written Notice
Notice of Evaluation
Notice of IEP Meeting <ul style="list-style-type: none"> • Parent Response • Second Notice • Friendly Reminder
Notice of Release/Consent to Request Confidential Information
Notice of Service Plan Meeting <ul style="list-style-type: none"> • Parent Response • Second Notice • Friendly Reminder

Notice to Parent of Rights Transferred <ul style="list-style-type: none"> • Notice to Student of Rights Transferred
Notice to Parent of Transfer of Rights <ul style="list-style-type: none"> • Notice to Student of Transfer of Rights
Notice to the Parent to Release Information for SHARS <ul style="list-style-type: none"> • Consent to Release Information for SHARS • Consent for Telehealth Services
Notice: Parent Revocation of Special Education Services
Parent/Guardian Acknowledgement
Parent-Directed Special Education Services (PDSES)
Physician's Information
Physician's Referral/Prescription for OT Services
Physician's Referral/Prescription for PT Services
Physician's Release from Homebound
Procedural Safeguards Log
Receipt of TSBVI Information
Receipt of TSD Information
Request for Records
Residential Facility Tracker Information
Review of Existing Education Evaluation Data (REED)
Service Plan Meeting
STAAR Alternate 2 Participation Requirements
Summary Report: Special Education/Related Services
Supplement: Assistive Technology (AT)
Supplement: Autism
Supplement: Communication Needs (DHH)
Supplement: Compensatory Services
Supplement: Extended School Year (ESY)
Supplement: Failure Review
Supplement: Graduation with Foundations <ul style="list-style-type: none"> • Opt-Out Agreement
Supplement: Language Proficiency Assessment Committee (LPAC)
Supplement: Manifestation Determination Review
Supplement: Medically Fragile
Supplement: Out of District Placement
Supplement: Personal Care Services
Supplement: Referral To RDSPD
Supplement: Transition
Supplement: Visual Impairment (VI)
Supporting Documents
Surrogate Parent
TELPAS Alternate Participation Requirements
Transfer Individualized Education Program (IEP)
Transition: Coordinated Set of Activities
Transition: Follow-Up Assessment
Transition: Parent Survey
Transition: SPP Indicator 13 Folder Review
Transition: Student Interview

Transition: Summary of Performance
Transition: Teacher Survey
Transportation Information

Appendix B: List of Forms in SE Basic New/Edit Forms dropdown

SE Basic is an available option for districts who need/want clerks, administrative assistants, teachers, etc. to only have access to the list of forms below.

Form Name
Accelerated Education Plan
Accelerated Plan/Intensive Program of Instruction
Behavior Intervention Plan
Behavior Intervention Plan (BIP)
Child Outcome Summary (COS)
Consent for Release: VI and DB
Consent to Transfer Assistive Technology Devices
Consent: Deaf-Blind Census Release
Consent: Residential Care release
Consent: Transition Release
Contact Log
Extended School Year (ESY) Information
Graduation Plan: Course of Study
Health Information
IEP Agenda
Incident Report: Restraint or Time-out
Medical Exception STAAR Alt 2 and TELPAS Alternate
No Authentic Academic Response STAAR Alternate 2 and TELPAS Alternate
Notice of IEP Meeting <ul style="list-style-type: none"> • Parent Response • Second Notice • Friendly Reminder
Notice of Release/Consent to Request Confidential Information
Notice of Service Plan Meeting <ul style="list-style-type: none"> • Parent Response • Second Notice • Friendly Reminder
Notice to Parent of Rights Transferred <ul style="list-style-type: none"> • Notice to Student of Rights Transferred
Notice to Parent of Transfer of Rights <ul style="list-style-type: none"> • Notice to Student of Transfer of Rights
Notice to the Parent to Release Information for SHARS <ul style="list-style-type: none"> • Consent to Release Information for SHARS • Consent for Telehealth Services
Parent/Guardian Acknowledgement
Procedural Safeguards
Parent-Directed Special Education Services (PDSES)

Receipt of TSBVI Information
Receipt of TSD Information
Request for Records
Residential Facility Tracker Information
STAAR Alternate 2 Participation Requirements
Summary Report: Special Education/Related Services
Supplement: Assistive Technology (AT)
Supplement: Autism
Supplement: Communication Needs (DHH)
Supplement: Compensatory Services
Supplement: Extended School Year (ESY)
Supplement: Failure Review
Supplement: Graduation with Foundations
Supplement: Language Proficiency Assessment Committee (LPAC)
Supplement: Manifestation Determination Review
Supplement: Medically Fragile
Supplement: Out of District Placement
Supplement: Personal Care Services
Supplement: Referral to RDSPD
Supplement: Visual Impairment (VI)
Supporting Documents
Surrogate Parent
TELPAS Alternate Participation Requirements
Transition: Coordinated Set of Activities
Transition: Follow-Up Assessment
Transition: Parent Survey
Transition: Student Interview
Transition: Summary of Performance
Transition: Teacher Survey
Transportation Information

Appendix C: Programs – Special Education Reports

Report Name	Purpose of Report
Annual/FIE Compliance	Provides a list of the selected students' previous and most recent Annual IEP Meeting Dates, and previous and most recent FIE Dates. This report is designed to verify the Annual IEP Meeting and 3-year Reevaluation were completed in timelines.
Annual/FIE Dates	Provides a list of students sorted by either Annual IEP or FIE dates.
Bulk Accelerated Plan/Intensive Program of Instruction	Prints Accelerated Plan/Intensive Program of Instruction for all students with a locked form.
Bulk Annual Goals	Prints Annual Goals (Draft, Locked, or Both) for multiple students.
Bulk Behavior Intervention Plan	Provides the last locked Behavior Intervention Plan for students with Behavior Intervention Plan marked Yes on Program Compliance.
Bulk Child Outcome Summary	Prints last locked Child Outcome Summary (COS) form for students.
Bulk PEIMS 163 Summary	Prints the PEIMS 163 Summary Sheets for multiple students.
Bulk Progress Reports	Print progress reports for multiple students in the selected campus or district.
Bulk Residential Facility Tracker	Prints Residential Facility Trackers for all students with a locked form.
Bulk Supplement: Compensatory Services	Prints the most recent locked Supplement: Compensatory Services in bulk or by individual student. Student data is presented based on the selected academic year. NOTE: Students will only appear on the report if: 1. The district and parent have agreed to compensatory services, and 2. A services start or end date falls in the selected academic year.
Bulk Supplement COVID-19 Special Ed Recovery Act	This report prints the most recent locked Supplement: COVID-19 Special Education Recovery Act in bulk or by individual student. Student data is presented based on the selected academic year.
Bulk Transition: Summary of Performance	Prints the Transition: Summary of Performance (SoP) form for multiple students.
Bulk Transportation Information	Prints Transportation Information forms for multiple students.
Campus Count by Disability	Provides a total number of students by disability for the specified campus(es).
Campus Count by Instructional Arrangement	Provides a total number of students by Instructional Arrangement for the specified campus(es).
Class List by Subject	Lists students that have specific subjects/service and the frequency of the subject/service.
ESY Bundle	Pulls data from relevant documents to create a by student report with information relevant to ESY. Data is

	sourced from the last locked version of the following forms, as appropriate: ESY Information, IEP Meeting (II. Determination of Eligibility and VI. Extended School Year (ESY) sections), Supplement: ESY, Transportation Information, Supplement: Autism, and Behavior Intervention Plan (all). This report pulls from forms locked during the CURRENT Academic Year. Goals displayed in this report come from the Supplement: ESY.
Extended School Year (ESY) Services	Enables the district to track which students are to receive Extended School Year (ESY) services, which service and for how much time. Data is pulled from the last locked IEP Meeting that includes Section VI. ESY where the Documentation was submitted question at the top of VI is marked Yes.
Federal Count Data List	Provides a list of students that are Compliant, Non-Compliant or Both when their Annual IEP and FIE Due Dates are compared to the Snapshot date.
Graduation Options	Identifies students scheduled to graduate in a given year. This report provides a list of students who have a locked Supplement: Graduation with Foundations form, their anticipated date of graduation and the identified PEIMS code under which the student will graduate.
IEP Meeting Participation	Provides committee member participation information from the IEP Meeting forms, including the interpreter use, parent participation and agreement, student participation, PWN, and Mutual Agreement. Also provides a second set of data listing each committee member's name, if selected or typed in the dropdown, and position filled for the IEP Meeting.
IEP Progress Tracker	Provides teachers and service providers the ability to print goals and objectives currently in effect to manually note progress.
Indicators by Student	Provides key data elements (indicators) found throughout the IEP meeting form and Student Information. The indicators include: English Learner (EL), Personal Care, Nursing, Assistive Technology, Dyslexia, Behavior Intervention Plan (BIP), Extended School Year (ESY), Medically fragile, Multiple Disabilities, ECI, ECSE, and RDSPD.
Instructional Arrangements	Provides a list of students by Instructional Arrangement based on their IEP Meeting Date.
Other Evaluations	Pulls information from the Other Evaluations grid on Section I (Review of Evaluation Data) of the IEP Meeting forms. Provides a list of students, date of report and when applicable, requested date of evaluation based on report parameters.
PEIMS 163 by History	Provides each PEIMS 163 record based on a specified date range, included the record in effect on the start date. Utilized to see how a student's services have changed over time. <u>NOTE</u> : statuses are historical and based on the value during the date range specified, not on the status currently found in program compliance.

PEIMS 163 by Services Start Date	Provides PEIMS 163 data based on a specified Services Start Date range. Utilized to verify changes in PEIMS data elements after an IEP meeting has been locked and to update the district's Student Information System. <u>NOTE</u> : statuses are historical and based on the value during the date range specified, not on the status currently found in program compliance.
PEIMS 163 by Snapshot Date	Provides the PEIMS 163 record in effect on the date specified. Utilized in preparation for PEIMS Snapshot or to gather information for any given date. <u>NOTE</u> : statuses are historical and based on the value during the date range specified, not on the status currently found in program compliance.
Related Services by Service	Provides a list of students by Related Service.
SB 89 COVID-19 Special Education Recovery Act	Provides a list of students and information from the last locked Supplement: COVID-19 Special Education Recovery Act form that meets the report parameters.
SHARS Consent and Notifications	Lists student Medicaid Consents and/or Notifications. Data displayed on the report originates from Student Information > Program Compliance. Notification dates in red indicates the parent has not received notification in the past year.
Special Education Language Acquisition (SELA)	Provides Special Education Language Acquisition (SELA) Data Collection points. Data is populated based on the last locked Supplement: Communication Needs (DHH) and grouped by the different data collection types. If more than one entry is made under a particular data type for the current academic year, both entries will be presented in the report.
Speech Services	Provides a list of students receiving Speech Therapy, as indicated in the IEP Meeting, with additional information a service provider may find helpful. The data includes: Student ID, Name, Campus, Grade, Annual IEP Date, FIE Date, Dyslexia, EL, Condition(s), IA-SC, Services Start Date, Program Name, Semester, Service Provider, Minutes General Education (Min Gen), Minutes Special Education (Min SpEd), Frequency and Duration, the service delivery type (Service Type), and Status. Services will pull from the last locked schedule matching the selected Academic Year. All other fields pull current data from Student Information.
SPP 11 & 12 Referral Timelines	Provides a list of students with a current special education status of Referral or Transferred and timelines for compliance on SPP Indicators 11 and 12. Dates in red indicate noncompliance. <u>NOTE</u> : 1. Once the referral process is completed and an IEP meeting held, students will no longer display on this report. Instead, they will display on the respective SPP Indicator 11 or 12 report.
SPP Indicator 11	Provides the required SPP Indicator 11 data elements

	<p>and student data for those counted in SPP 11. Data is pulled directly from Student Information > Program Compliance. Data is provided in two formats: Student Data and Student Totals (TEAL submission screen format). Student Data provides a list of students counted in a particular portion of the Student Totals (a, b, c, d, and e data). Each data set is presented on a separate sheet of the report.</p> <p>The final page provides additional support if a student is/is not included on the report as expected.</p>
SPP Indicator 12	Percentage of children referred by Part C prior to age 3, who are found eligible for Part B and who have an IEP developed and implemented by their third birthday.
SPP Indicator 13	The percentage of youth with IEPs aged 16 and above with an IEP that includes appropriate measurable postsecondary goals that are annually updated and based upon an age-appropriate transition assessment, transition services, including courses of study, that will reasonably enable the student to meet those postsecondary goals, and annual IEP goals related to the student's transition service needs. There must also be evidence that the student was invited to the IEP Team meeting where transition services are to be discussed and evidence that, if appropriate, a representative of any participating agency was invited to the IEP Team meeting with the prior consent of the parent or student who has reached the age of majority.
SPP Indicator 6	Percent of children aged 3 through 5 with IEPs attending a: A. Regular early childhood program and receiving the majority of special education and related services in the regular early childhood program; and B. Separate special education class, separate school or residential facility.
SPP Indicator 7	The percent of preschool children with individualized education programs (IEP) who demonstrate improved: (1) Positive social-emotional skills; (2) Acquisition and use of knowledge and skills; and (3) Use of appropriate behaviors to meet their needs.
Staff Planning	Provides an overview of student data and services to better equip district administrators with student-to-staff ratio and staff planning decisions.
State Assessments	Provides a list of students and their state assessments, accommodations, and additional comments. Data pulls from specific forms within the product specified.
Student Accommodations and Modifications	Lists instructional accommodations and/or modifications as deemed appropriate by the student's IEP team.
Student Campuses, Grades and Program Names	Provides a list of students with their campus and grade information as it appears in Student Information > Enrollment. This report also provides the Program Name if utilized in the IEP meeting forms. Used in preparation

	for and after summer Rollover to ensure students are available on their correctly enrolled campus and by administrators for staffing purposes.
Student Directory	Provides a list of students with their Name, Address, Phone Number, Campus, and Grade.
Student Restraint	Provides the restraint data for students from locked Incident Report: Restraint/Time-Out forms.
Students by Disability	Provides users a mechanism to view students by a particular area of disability.
Students by Form	Provides a list of students and forms grouped by Student or Form with the selected form in Draft, Locked, or Both.
Students with Compensatory Services	Provides a list of students in need of compensatory services based on the form Supplement: Compensatory Services. Student data is presented based on the selected academic year. Students will only appear on the report if: <ol style="list-style-type: none"> 1. The district and parent have agreed to compensatory services, and 2. A services start or end date falls in the selected academic year.
Students with Progress Reports	Displays students in special education on the selected campus and subject/focus areas in which the student has active goals, and for which reporting periods a progress statement has been saved.
Supplementary Aids and Services	Provides a list of students and information from the Supplementary Aids and Services data grid in the last locked Section IV. Determination of Services to be Provided IEP Meeting (All IEP Meeting types except the Transfer) or Schedule of Services (Transfer IEP Meeting) that meets the report parameters.
Teacher Bundle	This report provides information to the General Education Teacher for the selected students. Able to include the student's last locked BIP, FBA-BIP, goals and objectives, IEP Determination of Services to be Provided, PLAAFP, IEP State Assessment decisions, Supplement: Autism, Supplement: Personal Care Services, IEP Deliberations.
TELPAS, ERA, and District Assessment Decisions	Displays a list of students and their TELPAS, Early Reading Assessment, and District Assessment decisions from their last locked IEP meeting form containing a Section IV-B for the Academic Year indicated.
Transfer IEP Meetings	Displays information documented in locked Transfer IEP meeting forms: Transfer meeting date, conditions, IA, whether the student was an in-state or out-of-state transfer. Additionally, timeline tracking and information from the annual IEP meeting is included.
Transportation Eligibility	Provides relevant information from the Eligibility: Transportation form. As eligibility must be reevaluated every 3 years, the data in this report is no more than 3 years old from the Report Date.
Transportation Summary	Prints the data from the completed/locked Transportation Information forms.

TSDS Child Find	Provides the data requested for the TSDS Child Find submission, including students reported under SPP Indicators 11 and 12. Additional data elements are included to easily identify the student, campus, etc.
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Appendix D: SPP Indicator Data Sources

SPP Indicator 11 Data Sources

Report Field	Screen/Form	Field Name
Student ID	Student Information > Demographics	Student ID
State ID	Student Information > Demographics	State ID
Name	Student Information > Demographics	Last Name, First Name
Campus	Student Information > Enrollment	Current Campus
Grade	Student Information > Enrollment	Current Grade
Referral Date	Student Information > Program Compliance	District received a request to evaluate date field
Initial Consent for Evaluation	Student Information > Program Compliance	Initial Consent For Evaluation
# Absences	Student Information > Program Compliance	# of Absences
FIIE Due Date	Student Information > Program Compliance	FIIE Due Date
Actual FIIE Date	Student Information > Program Compliance	Actual FIIE Date
# School Days	NA	Calculated Value
IEP Mtg Due Date	Student Information > Program Compliance	IEP Mtg Due Date
Actual IEP Mtg Date	Student Information > Program Compliance	Actual IEP Meeting Date
District Declined	Student Information > Program Compliance	District declined to evaluate
Parent Declined	Student Information > Program Compliance	Parent declined district's offer to evaluate
Determined Eligible	Student Information > Program Compliance	Determined Eligible
Prior Year Claim	Student Information > Program Compliance	A claim was made that the student should have been referred for evaluation prior to the current school year; The claim was made by dropdown
Additional Services	Student Information > Program Compliance	Reason for Noncompliance > IEP Committee determined additional services are needed
Status	Student Information > Program Compliance	Status

SPP Indicator 12 Data Sources

Report Field	Screen/Form	Field Name
State ID	Student Information > Demographics	State ID
Name	Student Information > Demographics	Last Name, First Name
DOB	Student Information > Demographics	Date of Birth
Age	NA	Calculated Value
Current Campus	Student Information > Enrollment	Current Campus
Status	Student Information > Program Compliance	Special Education Status
ECI Referral	Student Information > Program Compliance	Yes/No Radio
ECI Referral Date	Student Information > Program Compliance	ECI Referral Date
# of Days till 3 rd Birthday	Student Information > Program Compliance	Calculated Value
ECI Transition Conference Date	Student Information > Program Compliance	ECI Transition Conference Date
Initial Consent for Evaluation Date	Student Information > Program Compliance	Initial Consent For Evaluation
TSDS Parental Consent Dale	Student Information > Program Compliance	TSDS Parental Consent Dale
Actual FIIE Date	Student Information > Program Compliance	Actual FIIE Date
Initial IEP Meeting Due Date	Student Information > Program Compliance	Initial IEP Meeting Due Date
Actual IEP Meeting Date	Student Information > Program Compliance	Actual IEP Meeting Date
Determined Eligible	Student Information > Program Compliance	Y/N Checkbox
Reason for Noncompliance	Student Information > Program Compliance	Reason for Noncompliance Checkboxes
If Other:	Student Information > Program Compliance	Reason for Noncompliance > Other Checkbox
Staff Reporting Noncompliance	Student Information > Program Compliance	Staff Reporting Noncompliance
ECI Effective Date	Student Information > Program Compliance	ECI Effective Date

SPP Indicator 13 Data Sources

Report Field	Screen/Form	Field Name
State ID	Student Information > Demographics	State ID
SSN#	Student Information > Demographics	Social Security Number
Student Name	Student Information > Demographics	Last Name, First Name
Date of Birth	Student Information > Demographics	Date of Birth
Campus	Student Information > Enrollment	Current Campus
Grade	Student Information > Enrollment	Grade
Gender	Student Information > Demographics	Gender
Ethnicity	Student Information > Demographics	Ethnicity
Primary Disability	Student Information > Program Compliance	Condition 1
IA	Student Information > Program Compliance	Instructional arrangement
Folder Review Date	Supplement: Transition	Folder review date
Responses to Items 1-8	Supplement: Transition	Questions 1-8
Meets Requirements?	NA	Calculated Value

SPP Indicator 6 Data Sources

Report Field	Product/Screen	Field Name
Student ID	Student Information > Demographics	Student ID
Student Name	Student Information > Demographics	First Name, Last Name
Date of Birth	Student Information > Demographics	Date of Birth
Current Campus	Student Information > Enrollment	Current Campus
Grade	Student Information > Enrollment	Current Grade
ECSE Indicator Code	Student Information > Program Compliance	ECSE Indicator
ECSE Location Code	Student Information > Program Compliance	ECSE Location
Primary Disability	Student Information > Program Compliance	Condition 1
Instructional Arrangement	Student Information > Program Compliance	Instructional Arrangement
Speech Count	Student Information > Program Compliance	Speech Count

SPP Indicator 7 Data Sources

Report Field	Screen/Form	Field Name
State ID	Student Information > Demographics	State ID
SS#	Student Information > Demographics	Social Security Number
Student Name	Student Information > Demographics	First Name, Last Name
Campus	Student Information > Enrollment	Current Campus
Primary Disability	Stu Information > Program Compliance	Condition 1
Multiple Disabilities	Stu Information > Program Compliance	Multiple Disabilities Indicator
IA	Stu Information > Program Compliance	Instructional Arrangement
Date ECSE Services Began	Child Outcome Summary	Date ECSE Services Began
Date ECSE Services Ended	Child Outcome Summary	Date ECSE Services Ended
Q1a Entry	Child Outcome Summary	Q1a Entry
Q1b Exit	Child Outcome Summary	Q1b Exit
Q2a Entry	Child Outcome Summary	Q2a Entry
Q2b Exit	Child Outcome Summary	Q2b Exit
Q3a Entry	Child Outcome Summary	Q3a Entry
Q3b Exit	Child Outcome Summary	Q3b Exit
Exit Reason	Child Outcome Summary	Exit Reason