10 STEPS FOR DEVELOPING AN IEP IN SIRAS

1. Click on picture of group of students to get your student list; click on student name to go to IEP Manager. Let your CASEMIS staff know if any of your students do not appear or if you see any students on your list that are not yours.

2. Go to Student Profile to check accuracy of information that will go directly onto IEP forms:
    a. Demographics: ethnicity, race, EL type
    b. Contacts – must at least have one primary contact
    c. Providers – must have case manager, all service providers should be listed
    d. Vision/Hearing results – can enter entire caseload under Student Info/Student Profile/Medical tab when you get report from nurse

3. Select meeting purpose on IEP Manager to get all forms associated with that meeting type. Refer to the handout 'Selecting a Meeting Purpose' for the definitions of each meeting type.

4. Enter meeting date, time, and location, if known. You may enter this information at any time.

5. To develop forms (IEP forms, Pre-IEP forms, Other forms):
    a. Open form.
    b. Make changes as needed to existing information.
    c. Add information as needed.
    d. Save the form. You have a choice between "Save" (which simply saves the information and keeps you on the same page) and "Save as…" (which saves the information and takes you to the location that you select from the menu). The menu defaults to "IEP Manager" but this feature allows you to bypass the IEP Manager and go directly to the next IEP page that you want to access.

6. Fill out all required IEP forms and desired optional forms for meeting. A green check mark will appear on all forms you have opened and saved. This does not mean you have successfully completed them, just that they have been opened and saved. All 'Required' forms must be addressed. Instructions for each form are available under HELP on the Menu bar for the form.

7. Use the 'Print/Preview' button on the IEP Manager to preview the paginated IEP for the meeting. It is recommended that:
    a. If there are errors, go back to the IEP Manager, and click on the page, make the correction, and save; then do 'Print/Preview' again. It is highly recommended that a complete draft of the IEP is developed prior to the meeting.
    b. If you will be using a computer during the meeting you may wish to bring drafts for team members to look at unless you will be projecting the IEP pages onto a screen. In either case, you can make any corrections or changes directly onto the forms. At the close of the meeting, use 'Print/Preview' to print out a paginated copy for the team to sign. This is the official copy of the IEP.

c. If you will not have access to a computer during the IEP meeting to make changes, print out the forms to present at the IEP. Make copies of the forms for IEP team members to refer to during the meeting and mark "*Draft*" on those copies, but not on the original document. Any changes or corrections made at the meeting will need to be made in handwriting on the original. Once signed, this becomes the official copy of the IEP. Destroy all draft copies.

8. After the meeting:
    a. Click on "Meeting Held". That will push all the CASEMIS data for the completed IEP over onto the MIS Summary page, for reporting to the state..
    b. If you made any handwritten changes on the printed copy during the meeting, go back into the forms on the computer and enter the information so the electronic and printed copies of the IEP are exactly the same.
    c. Use the 'Print/Preview' feature to compile the final IEP for proofreading.
    d. Proofread the IEP carefully to be sure all corrections were made.
    e. If anything was missed, you can still make changes on the form and reprint that page if needed.

9. Final steps (IEP Manager):
    a. Check "Translation Needed" if appropriate. If the Agreement and Attendance page indicates oral translation only, do not check the Translation needed box. Translations can be done any time, even after the IEP has been 'Finalized'. It is preferable not to begin the translation before finalizing the IEP to ensure all changes have been made to the IEP before translating.
    b. Fill in information on drop down menu regarding Parent Response & Participation.
    c. Check any notes you have put in the Scheduling Notes box on the IEP Manager to be sure they reflect the comments you want to remain in the record after the meeting has been finalized. Delete any working notes or resolved issues. Enter any other information pertinent to the meeting outcome (e.g. "Meeting finalized even though parents did not sign;" "additional assessment to be conducted before scheduling another meeting.")
    d. Click on 'Finalize' to lock the IEP so no further changes can be made.
    e. Send signed original paper copy to the office and click "Sent to district office" from the menu in the Forms Status box under 'Followup'.

10. Depending on your district's policy, normally CASEMIS staff will do a final review of the paper and electronic copies to be sure they are the same and validate the data. If there are inconsistencies or errors on the electronic copy the CASEMIS staff person will 'Reactivate' the IEP and return it to you for corrections. Note, <u>no</u> data will transfer into the MIS Summary page after a meeting has been 'Finalized'. If an IEP has been 'Reactivated' and it required a change to a CASEMIS item, that CASEMIS item will need to be changed on the MIS Summary page separately by the CASEMIS staff.

    Refer to the document on *Issues Related to Finalizing and Reactivating IEPS* for guidelines on when to re-activate a meeting, or when to do an Amendment, versus an Addendum.