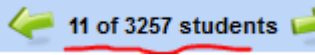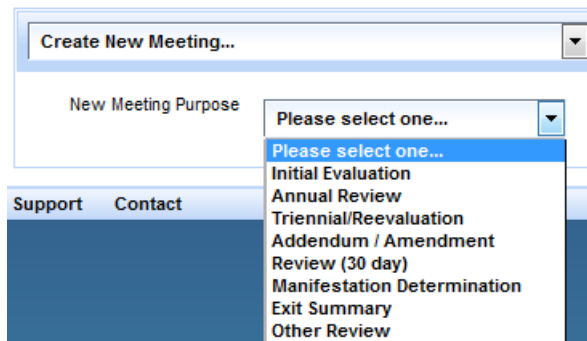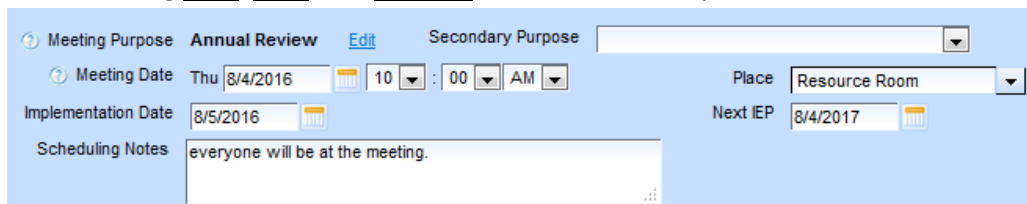1. Click on the **Choose Student** icon to get your student list; click on student name to go to **IEP Manager**. Let your district special education secretary know if any of your students do not appear or if you see any students on your list that are not yours.

2. Go to **Student Profile** under Student Info menu to check accuracy of information that will go directly onto IEP forms:
    - **Demographics**: ethnicity, race, EL type
    - **Contacts**: must at least have one primary contact
    - **Providers**: must have case manager, all service providers should be listed
    - **Goals**: Complete goals in Goal Developer
    - **Vision/Hearing results; Medication; Overall health**: can enter entire caseload under Student Info/Student Profile/Medical tab when you get report from nurse. Lists/reports can be created once this information is in SIRAS.

3. **Select meeting purpose** on IEP Manager to get all forms associated with that meeting type. Refer to the handout '**Selecting a Meeting Purpos**e' for the definitions of each meeting type.
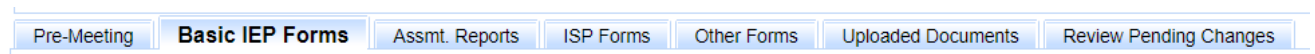
4. Enter meeting **date**, **time**, and **location**, if known. You may enter this information at any time.

    The <u>Implementation Date</u> will automatically be entered on day after the meeting date. If that is not the cases it can be changed; this will also auto enter the service start date. The <u>Next IEP</u> and (depending the meeting is a Triennial) the <u>Next Evaluation</u> date will be auto entered.

5. Select **IEP Manager Tabs:** Basic forms (IEP forms); Pre-Meeting forms; ISP Forms*****; Assmt Report*****; Other forms and Upload Documents. ** not available in all SELPAs.*
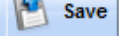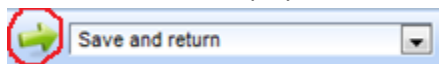
    - **Pre-Meeting** tab contains the forms used prior to the meeting such as the Meeting Notice and the Assessment Plan.

- **Basic Forms** tab opens as the default and contains all the forms that are used at the time of the actual meeting. Once all the required forms have been submitted click the 'Preview/Print' link to assemble the IEP.
- **Assmt. Reports** tab *(not available for all SELPAs)* contain the narrative assessment reports. Once all the required forms have been submitted click the 'Preview/Print' link to assemble the IEP.
- **ISP Forms** tab is used to develop the ISP forms. Once the first ISP form is submitted the student's plan type will change to ISP and 'ISP Forms' will be the default tab instead of the Basic Forms tab.
- **Other forms** tab contains other forms that may be necessary for the IEP meeting but is not a numbered page in the IEP such as the Health History or Parent Interview forms.
- **Uploaded Documents** tab is used to upload any document associated with the meeting such as doctor's notes or an evaluation from an outside source, etc. If the form is uploaded as a PDF document it can be appended as a numbered form with the IEP. If you designate it as a copy of the signed signature page under 'Category' SIRAS will replace the uploaded signature page with the blank one. Click the blue question mark button located in the lower left corner for more details. *DO NOT enter periods in the file name of an uploaded form.*
- **Links / Requests** manage the form links sent to parents/guardian; General Ed; or Other Participant for form completion outside of a SIRAS user and eSignature requests.
- **Review Pending Changes** tab will allow the user to review the updates to the MIS Summary (CALPADS) Page after the 'Meeting Held' checkbox has been checked.
- **Change Log** records CALPAD changes to the IEP before and after consent has been received.

6. Fill out all **required (red) 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.
- Open form (all required forms must be submitted before the IEP can be assembled)
- Make changes as needed to existing information. Click blue question mark button at the top of the form page for directions on how to complete the form.
- Add information as needed.
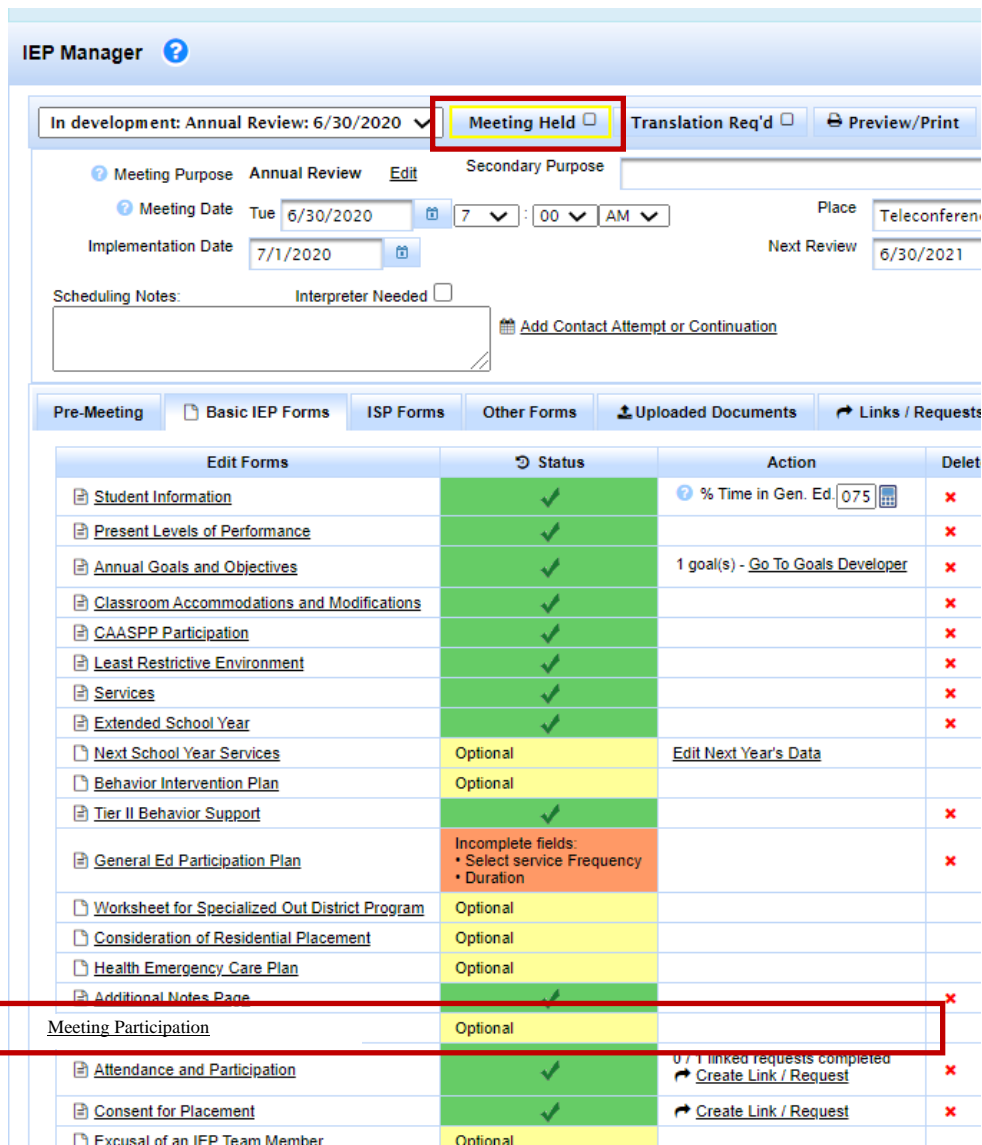- **Save** the form. You have a choice between "**Save**" (which simply saves the information and keeps you on the same page) and "**Save and return**…" (which saves the information and takes you to the location that you select from the menu). The menu defaults to "**IEP Manager**" but this feature allows you to bypass the IEP Manager and go directly to the next IEP page that you want to access.

Meeting Participation form: The Participation form is to be signed at the beginning of the IEP meeting to record the attendance. The Parents/Guardians and all IEP Team Members present at the IEP meeting will

sign the Meeting Participation form. This form does have the ability to track participation for multiple continuation meetings if necessary.

Consent form: The Consent form is to be signed only by the Parents/Guardians when the IEP has come to Consent, Partial Consent, or Disagreement. The appropriate Parent Response will be selected, and the meeting can them be Finalized.

1. In Preparation for the IEP meeting the **Meeting Participation form** is to be printed out and then presented to the Parent and IEP Team at the start of the meeting to be signed.
2. If you are holding a remote meeting, the **Meeting Participation form** can be sent out electronically by email to the Parent and IEP Team just prior to the meeting by creating a **Manage Link** request.
3. You do not have to check meeting held to send **Manage Link** request for the **Meeting Participation form**.
4. This form will be used to record Parent and IEP Team participation.

1. Check **Meeting Held** once the meeting is completely finished.
2. Choose the appropriate **Parent Response**.
3. If the parent attended the meeting in person and agrees to the IEP, present the **Consent for Placement form** to the parent for them to sign.
4. Once the parent signs the Consent for Placement form in agreement, you may select the **Parent Response: Accepts the Plan** and then **Finalize** the meeting.
5. If you are **waiting on signatures choose Awaiting Consent** *(Meeting Held must be checked to send the Consent form electronically).*

Please note: Verbal agreement is not enough to check Accepts the Plan, you must have a parent signature to choose Accepts the Plan
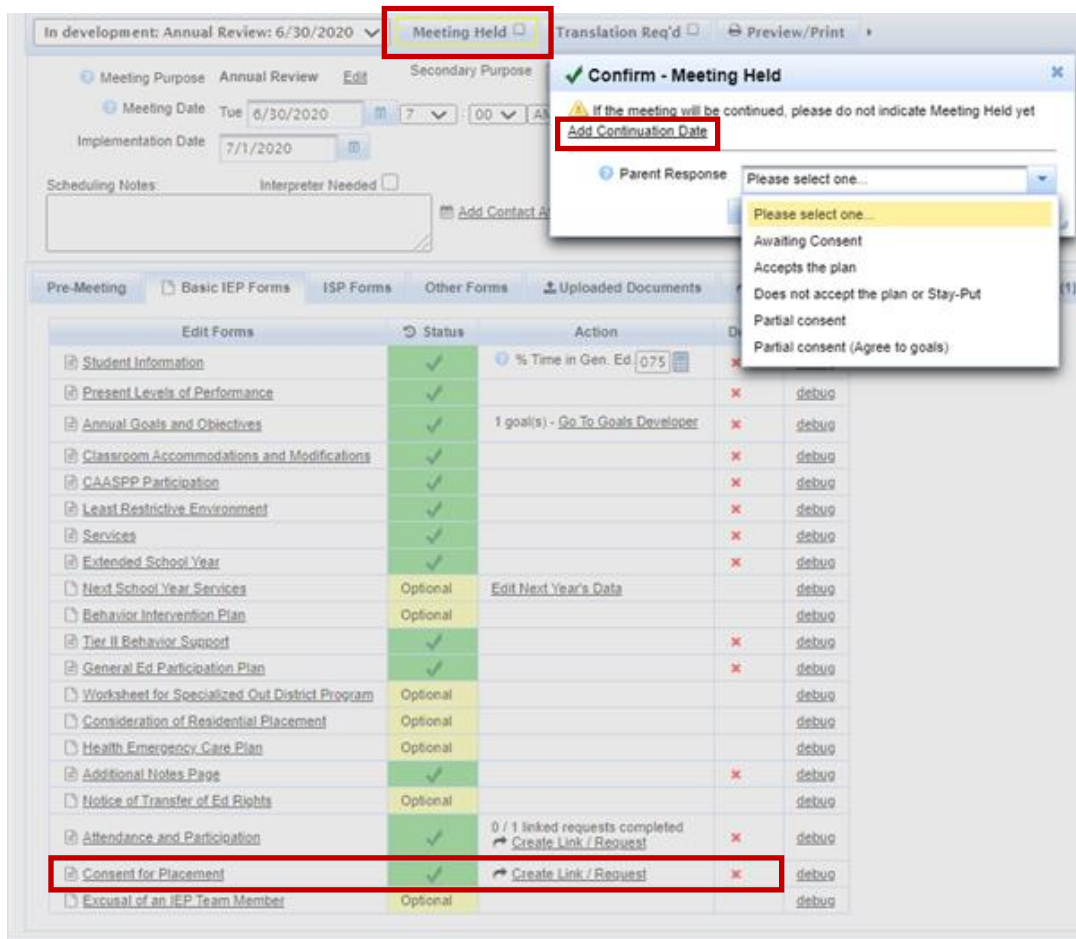
6. Once you receive signed Consent of the IEP from the Parent, change the Parent Response from Awaiting Consent to the appropriate Parent Response and Finalize the meeting.

7. Use the '**Print/Preview**' button on the IEP Manager to preview the paginated IEP for the meeting. It is recommended that 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.

- 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.

- 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. A "Draft" watermark can be placed on the IEP by clicking the little triangle to the right of the 'Preview/Print' link and then select 'Add draft watermark'.
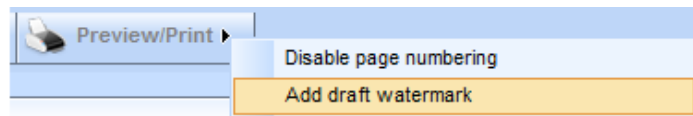
- Any changes or corrections made at the meeting will need to be made in handwriting on the original. Once signed, this becomes the official copy of the IEP. Destroy all draft copies.

8) After the meeting
    - Click on "**Meeting Held**" checkbox. SIRAS will apply 'Awaiting Consent'. Once consent has been acquired, change the Parent Response to 'Accepts the plan'. That will push all the critical data for the completed IEP over onto the MIS Summary page, for reporting to CALPADS. 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 the exactly same.
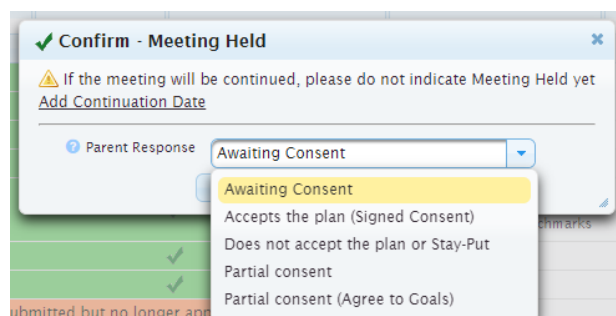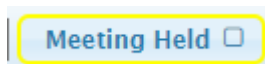
    Clicking on 'Does not accept the plan/Stay-put' or 'Meeting to be continued' will only insert the dates into the MIS Summary page. All other options will insert all CALPADS updates to the MIS Summary page.

    - Use the '**Print/Preview**' feature to compile the final IEP for proofreading located above. The '**Preview/Print**' will be inactive until ALL the required (red) forms have been submitted.
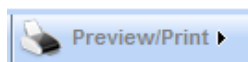
9) <u>Proofread</u> the IEP carefully to be sure all corrections were made.
   - If anything was missed, you can still make changes on the form and reprint that page if needed.

10) **Final steps** (IEP Manager):
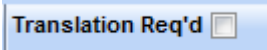
   - Check "**Translation Needed**" where appropriate. Translation Req'd ☐ If the Agreement and Attendance page indicates oral translation only, <u>do not check the Translation needed box</u>. Translations can be done any time even after the IEP has been '**Finalized**'. *It is preferable not to begin the translation before finalizing the IEP to ensure all changes have been made to the IEP before translating.*

   - Fill in information on drop down menu regarding **Parent Participation & Response.**

   Parent Participation

⑦ District facilitated parent involvement?	○ Yes ○ No ○ No response
Response	Please select one... ▼
Participation	Please select one... ▼

   - 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.")

   Scheduling Notes: Interpreter Needed ☐

   IEP opened over the phone 12/10/19. Part 2 could not complete due to school closure Covid 19. Will complete when school resumes.

   - Click on '**Finalize**' to lock the IEP so no further changes can be made.

   - Send signed original paper copy to the office and click "Sent to district office" from the menu in the Forms Status box under 'Follow-up'.
     - The signature page can be scanned and uploaded as a PDF file into the Upload Documents tab or under Student Info / Student Profile / Upload Documents tab if the meeting had already been Finalized.

   - Depending on your district's policy, normally Admin staff will do a final review of the paper and electronic copies to be sure they are the same and validate the data.

Followup

Sent to District Office ☐

Forms Status [_____] [▾] [_____] [📅]

General Users will only see 'Sent to District Office' checkbox while the Admin users will see both 'Sent to District Office' checkbox 'Form status' which contains the options:

Sent to district office
Received by district, complete, signed
Received by district, complete, unsigned
Received by district, incomplete, signed
Received by district, incomplete, unsigned
Incomplete, returned to teacher
IEP Errors need to be corrected

Reactivating a Finalized Meeting

If there are inconsistencies or errors on the electronic copy the Admin staff person will '**Reactivate**' the IEP and return it to you for corrections. Note, no 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 CALPADS item, that CALPADS item will need to be changed on the MIS Summary page separately.

Parent Participation

⑦ District facilitated parent involvement?   ◉ Yes ◯ No ◯ No response

Response [Accepts the plan ▾]

Participation [Parent/Guardian Attended ▾]

Followup

Sent to District Office ☐   Translation Required ☐

Forms Status [_____] [▾] [_____] [📅]

Finalized by Adriana Valencia on 6/24/2016 9:46 AM   Reactivate

Issue Related to Finalizing and Reactivating IEPs

After an IEP is developed in the IEP Manager, it is expected that the case manager will click on the 'Print/Preview' to create a draft of the IEP. After the meeting, is held, the case manager should click the Meeting Held button and enter the Parent Participation information. This lets anyone who looks at the IEP Manager know the status of the meeting.

If a computer and printer are not available during the meeting, the hard copy draft of the IEP should have changes on it written in by the case manager or other members of the team. At the very least, the team would need to add the Parent Comments to the Present Levels page on this copy. In most instances there will also be meeting notes written onto the IEP. Any other changes to the draft of the IEP would also be

written onto the hard copy. At the close of the meeting, the parents will be asked to initial and sign this copy. This will then be the legal copy of the IEP.

The case manager is now responsible for going into the electronic copy of the IEP, and entering all changes made by hand on the paper copy so that the electronic copy of the IEP in SIRAS matches the hard copy of the IEP signed by the parent. Once this process is complete, the case manager should Finalize the meeting, enter the Parent Input and Follow-up information on the IEP Manager, and send the hard copy of the IEP to the Admin staff to verify that the hard copy and electronic copy match.

The IEP should never be Finalized before the case manager has a chance to make the electronic copy in SIRAS the same as the hard copy of the IEP because once the IEP has been Finalized, it no longer pushes new information into the MIS Summary page. If the case manager accidentally Finalizes a meeting prior to completing the electronic copy, s/he will need to contact a Admin staff person who can go to the archived meeting in the IEP Manager and Re-activate that meeting.

Once the meeting has been reactivated the case manager can enter the corrections on the IEP forms and Finalize the meeting again, however once a meeting has been Finalized there is NO data transfer between the re-activated forms and SIRAS. This could result in compliance errors. For this reason, any corrections and/or changes to CALPADS data after a meeting has been reactivated must be entered on the MIS Summary page as well as on the IEP meeting forms.

In the event that something superficial was left out on the IEP which was noticed AFTER the parent signed the hard copy, it is permissible for the case manager to do an Addendum or Administrative Amendment (per district policy). Some examples would be things like entering vision or hearing test results, adding an accommodation, or checking a box on one of the pages. In the event that the change is more significant such as dismissing or adding a service it is recommended that an 'Other Review' be held.

It is never permissible to make changes to the electronic copy of the IEP that are not on the original hard copy of the IEP signed by the parents. The IEP document is a legal agreement between the parent/guardian/adult student and it cannot be altered after it is signed without permission from the parent/guardian/adult student. Any changes to the IEP must be made by one of the methods listed above.

Editing the Meeting Purpose

The user that created the meeting has the ability to edit the Meeting Purpose. In the IEP Manager, next to the Meeting Purpose, the user who created the meeting will have an edit button available to them. Clicking on the edit button will unlock the Meeting Purpose and allow you to choose a new Meeting Purpose from a drop-down menu. Do not delete any forms that may have be completed. The program will redistribute the IEP forms based on the new Meeting Purpose selected. All forms that were completed for the previous Meeting Purpose will be saved; any forms completed and saved that are no longer applicable may be deleted by clicking on the red X in the action column to the right of the form.
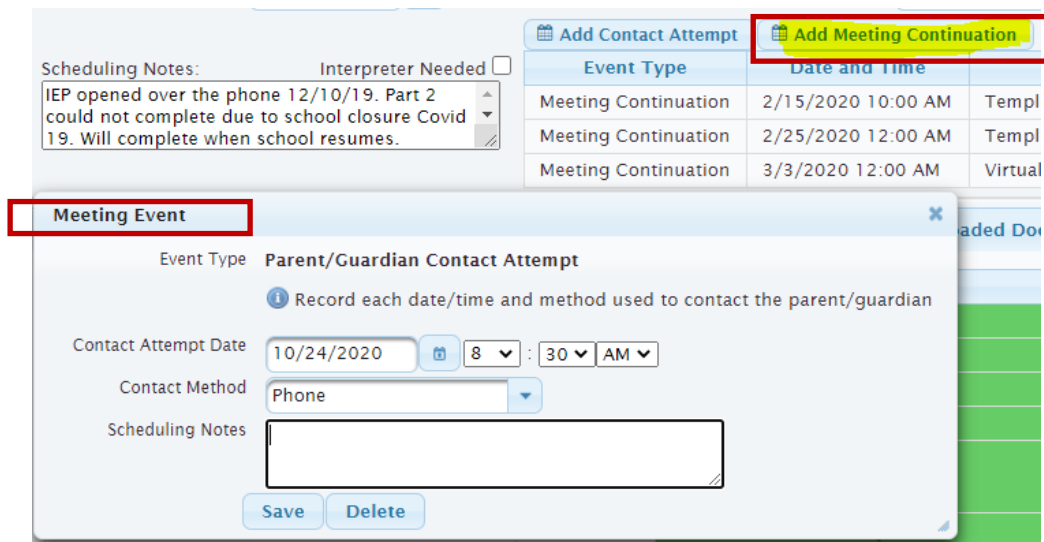
Rescheduling a Meeting

A meeting may be rescheduled by changing the meeting date to a later date, time, and location if needed. Do not delete the meeting or you will lose all the work that has been done to the meeting. Send out a new Notice of IEP to the parents informing the parent/s of the new date, time and location.

Continuing a Meeting

Continuation Meeting: A **Continuation Meeting** occurs when the Parents/Gaurdians and IEP Team needs to reconvein to further discuss the IEP at another time or the IEP team meets the day of a scheduled meeting and the Parent does not show, thus having to schedule a continued meeting when the Parent is available.

- To schedule a **Continuation Meeting**, click on the link **Add Contact Attempt or Continuation**
- The **Meeting Event** box will then pop up.
- Select **Meeting Continuation** and then fill out the Continuation Date, Time, Place, and any notes you would like to record and click **Save**.

- The **Meeting Continuation** information will be listed underneath the Add Contact Attempt or Continuation link.
- Next go to the Pre-Meeting tab and complete the Notice of IEP – Continuation Meeting form (this form can be sent electronically to the parent to sign).
- For 2nd or 3rd continuation meeting, click the **Add Page** button at the top of the form.

- The day of the Continuation Meeting, follow the outlined steps above to fill out the Participation form, choosing a Parent Response, Continuing the meeting again, or Finalizing the meeting.

Logging Parent Contacts

Contact Attempt: A **Contact Attempt** can be created by the provider to record all attempts to contact the parent about and IEP Meeting.

- To create a **Contact Attempt**, click on link **Add Contact Attempt or Continuation.**
- The **Meeting Event** box will then pop up.
- Select **Contact Attempt** and then fill out the Contact Attempt Date, Time, Method, and any notes you would like to record and click **Save**.

- The Contact Attempt information will be listed underneath the Add Contact Attempt or Continuation Link, along with the Meeting Continuation information.
- Check with your district about their policy on when repeated attempts to contact the parent/guardian have been unsuccessful.

Deleting a Meeting

The user that created the meeting has the ability to delete the meeting. In order to delete a meeting, the user must delete all submitted forms by clicking on the red 'X **Delete'** to the right of the form link. Be sure to delete all the other submitted forms in the Basic forms tab and the Pre-Meeting forms tab and the Other Forms tab. You will also need to delete the Meeting Date. After this has been completed the meeting may be deleted by clicking on the red X that is labeled delete in the right of the menu bar of the IEP Manager.

Finalizing a Meeting

Before a Parent Response is changed to 'Accepts the plan' and Finalized, the case manager is responsible for going into the electronic copy of the IEP and entering all changes made to the IEP during the IEP meeting. This is to ensure the electronic copy of the IEP is the same as the copy of the IEP given to the parent. Once this process is complete, the case manager can Finalize the meeting and enter the Parent Input and Follow-up information on the IEP Manager. A hard copy of the IEP may be sent to the Admin staff to verify that the hard copy and electronic copy match.

Once the IEP has been Finalized, it no longer pushes new information into the MIS Summary page. If the case manager accidentally Finalizes a meeting prior to completing the electronic copy, s/he will need to contact a Admin staff person who can go to the archived meeting in the IEP Manager and Re-activate that meeting.

Once the meeting has been reactivated the case manager can enter the corrections on the IEP forms and Finalize the meeting again. Any corrections and/or changes to CALPADS data after a meeting has been reactivated must be entered on the MIS Summary page as well as on the IEP meeting forms.

It is never permissible to make changes to the electronic copy of the IEP that are not on the original hard copy of the IEP signed by the parents. The IEP document is a legal agreement between the parent /guardian/adult student and the document cannot be altered after it is signed without the permission from the parent/guardian/adult student.

Meetings should be finalized as quickly as possible after the meeting has been held, best practice is 24-48 hours. Once finalized, a record that the IEP meeting was held will automatically be sent to CALPADS. With virtual meetings and electronic signatures, most meetings are "Awaiting consent" after they are held for sometimes a week or more while obtaining signatures. If after attempts to use the electronic signature link, re-sending the link, mailing home a copy of the form with a signature and self-addressed stamp[ed return envelope or meeting with the parent to sign the forms, the forms are still not signed, note your contact attempts in SIRAS. At this point, contact your SPED administrator for their direction about the need to finalize your IEP meeting, as it cannot be finalized as "Awaiting Consent." Without written parent consent, we cannot finalize the IEP meeting as "Accepts the plan." If the meeting is finalized as "Does not accept the plan" the meeting will be archived and resulting meeting data sent to CALPADS. This will allow CALPADS to know that you held an IEP meeting.   If the parent later returns the form with written consent, upload the signed form to the SIRAS record and change the parent response to "Accept the plan" the IEP Manager and notify your SIRAS Data administrator. The SIRAS Data administrator will confirm that any changes to the student's MIS data are properly documented in current and archived meeting data.