

Selecting a Meeting Purpose

When planning an IEP meeting, the first step is to select the meeting purpose. The choices are as follows:

1. **Initial Evaluation** – Selected only when the student is first evaluated for Special Education, including preschool services. If a student does not qualify for services, it is still marked as the Initial Evaluation but no date is recorded for “entering Special Education.” Subsequent IEPs for a student previously found not eligible will still be considered an Initial Evaluation, and the date of the IEP in which student is found eligible will be the Initial Evaluation date. (If the student exits Special Education and re-enters at a later date, that IEP will be considered as an Initial Evaluation.) *Note: The Initial Evaluation date was a new field introduced July 1, 2006. Therefore, some students who entered Special Education before that date may not have an Initial Evaluation date in their records because it was not required.*

If the student is found to be eligible at the Initial Evaluation, SIRAS will generate a Next IEP date of one year from the date of the meeting, a next Triennial date three years from the date of the meeting, and an Implementation Date of the next day after the meeting. The Implementation Date may be changed by the user if the full IEP is not going to be implemented the next day. (If implementation of a particular service will be delayed, it can be noted by changing the Begin Date in the services box at the bottom of the page.)

If a student does not qualify at the Initial Evaluation, check “Not Eligible” at the bottom of the Eligibility box, and all of the pages not needed for the student will drop off the list. Only the pages needed for a non-eligible student (Student Information and Services, Present Levels, Specific Learning Disability pages if needed, optional Additional Page, and Agreement/Attendance) will be required. If any of the other pages had been filled out prior to the determination that the student did not qualify, they should be deleted using the X in the Action Column to the right of the form on the IEP Manager. Do not worry about any errors that may be showing on the MIS Summary at this time. As soon as you check the “Meeting Held” box, the plan type will change from IEP (10) to Not eligible (90) and the errors will clear.

Note: SIRAS blocks users from doing a second Initial Evaluation if the student has an Initial IEP date and is currently enrolled in special education. If a second Initial IEP is needed for a student who was previously assessed and found to be “not Eligible” or was previously in special education and exited, the program will prompt you to Reset the Referral Information. When you click on that option SIRAS will remove the old referral information and allow the user to do another Initial Evaluation. If the meeting is deleted because the parent denies permission to assess or new evidence arises that suggests a new Initial is not needed, SIRAS will restore the original information on the MIS Summary.

2. **Annual Review** – Used for an review done when the entire IEP is revised. This is used even if the review is held earlier than twelve months from the last IEP. All required pages of the IEP must be completed and new goals/objectives developed and adopted. If the Annual Review date coincides with the Triennial/Reevaluation date, then the meeting is a Triennial Review. The Annual Review date will be automatically set as one year from the date of the Annual Review or Triennial/Reevaluation.
3. **Triennial/Reevaluation** – Selected whenever the student’s continued eligibility for Special Education is reevaluated. Must be within 3 years from the date of the last evaluation but may be conducted sooner if a new evaluation has been conducted to determine the student's continued eligibility or to change eligibility.

The Triennial/Reevaluation is also used for reevaluations for transition from preschool into Kindergarten. The Triennial/Reevaluation will reset the next IEP date to one year from the date of the meeting and the next Triennial/Reevaluation date to three years from the date of the meeting.

If the Triennial/Reevaluation is being held for transition from preschool, this should be indicated as a secondary purpose for the meeting. Similarly if the student is age 15 or above, transition to adult life should be listed as a secondary meeting purpose. These are the only two instances in which a secondary purpose needs to be listed. If the triennial happens to coincide with another type of meeting (such as transfer to middle school or transfer to high school) this can be indicated on the IEP Notice on the Additional Information line (just below the date, time, and place of the meeting), but these secondary purposes are not listed as "reasons" for the Triennial/Reevaluation IEP.

The meeting purpose of Triennial/Reevaluation is also used when a student with an IEP transfers into the district from out of state. For out of state students a reevaluation must be conducted, (with all elements of a Triennial Review), to reestablish eligibility and need for services.

If new assessment will be conducted, an Assessment Plan will be generated with a 60 day timeline for completion of the assessment, with an IEP meeting held no later than the end of the 60 days. However, if the team determines there is adequate information already available in the student’s record and that no additional data are needed, the Triennial Review Summary (located under Tools/Added Forms/Triennial) is completed and presented at a Triennial/Reevaluation meeting within 30 days.

Note: If a student is found to be no longer eligible at the Triennial/Reevaluation, fill out only the pages needed for a non-eligible student (Student Information and Services, Present Levels, Specific Learning Disability pages if needed, optional Additional Page, and Agreement/Attendance). Then click the Exit Student button at the bottom of the Dates box which will enter an Exit Date and Exit Reason (Returned to general education, no longer eligible). The Exit Student box will also

remove the next IEP date, the next Tri date, the disability, and all services from the SIS page and change the % in general education to 100%. Do not check Not Eligible. This box is only used for Initial Evaluations. Also do not put anything in the Dismissed from box. This box is used only when students are being dismissed from one or more services and continue to be eligible for special education.

When you save this page with Exit Date and Exit Reason, all of the pages not needed for the student will drop off the list. The Student Information and Services page will have the information the way it needs to be for the IEP, but all the CASEMIS data will remain on the MIS page for CASEMIS reporting. See document on *Exiting A Student from Special Education* for more detailed information.

4. **Transition to Adult** – Added as a secondary purpose for all of the above meetings if the student will be 16 years old or over before the next IEP meeting. In this case, the Transition to Adult Life and Transitioning from Public School to Adult Agencies pages are required. The transition pages are not required for any of the other meeting types listed below except for a 30 day review when a new IEP is being developed.
5. **Addendum/Amendment** - Used to make changes to the IEP (e.g. add accommodations or an additional goal). The Addendum requires an IEP team meeting; the Administrative Amendment does not; however, the Administrative Amendment requires permission prior administrative approval (check district policy).

An Addendum or Amendment does not change any dates from the original IEP except the Implementation date. No other pages are required for an Addendum or Amendment, but SELPA has elected to make most IEP pages available as optional forms. The Addendum or Amendment form may be used in combination with any of the other IEP pages (with the exception of the Student Information and Services page) that may be appropriate to assist in entering data into SIRAS. For example, if changes are being made to classroom accommodations it would be preferable to have those changes made directly on the Classroom Accommodations page of the IEP so the data would be saved correctly in SIRAS, or if the purpose of the Addendum/Amendment was to correct an error on one of the IEP pages, it might be more clear if the corrections were made directly onto that form and then saved to SIRAS as corrected.

6. **Review (30 day)** – Used if the student is transferring in from a district outside of the SELPA, but within the state of California with a current and active IEP. A meeting is not required upon enrollment, but the district should immediately create a new student in SIRAS and enter all CASEMIS information from the student's current IEP. A review meeting must be held within 30 days of enrollment.

If the team will be developing a new IEP, the purpose of the meeting at the end of the 30 days will be noted as a "Review (30 day)," all pages required for an annual review will be required, and a new annual review date will be established. The Next Triennial date will remain the same as indicated on the IEP from the previous district.

If the team will not be developing a new IEP and will be implementing the IEP from the previous district as written, check the box under the enrollment date on the IEP Manager to “Adopt existing out-of-SELPA IEP” and the program will indicate Adopt out of SELPA IEP as the secondary purpose of the Review (30 day) meeting. The next IEP date and the Next Triennial date will remain the same as indicated on the IEP from the previous district.

When adopting an IEP from the previous district, all pages of the IEP will be available, and all information in that IEP needs to be transcribed onto the Ventura County SELPA forms. Any other information required to make the IEP legally compliant would need to be added. Minor changes to the student’s services (percent of day and minutes), accommodations, CAASPP participation, etc. can be made just as it would on an Other Review. Use the Additional page as needed to capture information from the former district’s IEP that does not fit into the SELPA forms.

The Review (30 day) is **not** used when a student transfers into the district from out of the state or from within the SELPA. Transfers from out of state require a Triennial/Reevaluation meeting. Transfers from a district within the SELPA do not require an IEP meeting unless the district feels it is necessary to change parts of the IEP from the previous district. In this case, changes to the IEP could be done through an Addendum or Other Review/Addend IEP. *See related document on “Transfers of Students with IEPs into the District” under SIRAS Guidelines for more specific information on procedures for students who transfer into a new district.*

7. **Manifestation Determination Review** – Used whenever a student has reached or is close to reaching the 10th day of suspension and there is a pattern of behaviors and/or the student is being considered for expulsion. In most cases, the Manifestation Review will be a separate meeting to consider the student's behavior(s) that led to the suspension(s) or consideration for expulsion; however, the Manifestation Determination Review Worksheet is also available as an optional page for the Annual Review and Triennial/Reevaluation meetings in case it is needed. The secondary purpose of "Possible Change of Placement" may be used for the Manifestation Determination Review if it is suspected that the student's current placement may be a factor.
8. **Exit Summary** - Used to document the discussion between a high school or post-secondary student exiting Special Education and his/her case manager to discuss the Exit Summary. The Exit Summary should be completed for every student leaving school due to graduation, aging out, or withdrawal after age 18. It does not have to be completed in the context of an IEP meeting and is usually done no more than one or two weeks before the student is leaving. Case Manager completes the forms, presents to the student, obtains student signature, gives copy to student, and also gives a copy to CASEMIS clerk to establish baseline and provide contact information to use when doing the post-secondary follow-up one year after the student exits Special Education.

9. **Other Review** – may be used for meetings when a portion of the IEP is being revised, not considered to be an Annual Review. Other Reviews may be conducted for a number of reasons: Behavior, Parent Request, Review Progress, Additional Assessment (to look at the need for additional service--not an evaluation to determine eligibility), Possible Change of Placement, Consider Exiting, Transfer to Kindergarten (only for students entering preschool within the last 90 days of the school year), Transfer to Middle School, or Transfer to High School. The Other Review may also be used instead of a "stand alone" Addendum, particularly if the proposed changes to the IEP will impact CASEMIS data. It is important that the Secondary Purpose of the meeting be specified. If none of the other choices seem to "fit" then use "Addendum/Amendment."

The only required pages for the Other Review are the Student Information and Services page and the Agreement/Attendance page. All other pages are optional but if changes are made related to CASEMIS data on pages such as the State Testing, Transition, or English Language Development pages, it is preferable to make the changes directly on those forms for ease in pushing the data directly into SIRAS rather than having the CASEMIS staff enter those changes by hand on the MIS Summary. In most cases the optional Additional page should be used to clarify the purpose of the meeting and indicate changes that have been made to the IEP.

An Other Review does not reset any dates from the previous IEP except the implementation date. Therefore, if goals are added during this meeting the target dates should correspond with the target dates of the other goals in the IEP.

10. **ISP (Private School)** – typically used for the annual review meeting for an ISP that was developed as part of an Initial or Triennial/Reevaluation meeting for a student who is eligible for special education services in the public school but has been placed by his/her parent(s) in a private school. If the IEP meeting has been finalized prior to development of the ISP, then an Initial or Triennial ISP can be developed under this meeting purpose. See related document *"Guidelines for Developing Individual Services Plans (ISP) for Private School Students In SIRAS" under SIRAS Guidelines for more specific information.*

Special Notes Regarding Meetings Needing to Be Changed on the IEP Manager:

- If you select the wrong meeting purpose and have not completed any forms, you may simply “Delete” the meeting using the red x on the menu bar across the middle of the page. If you realize you have selected the wrong meeting type after you have completed some of the IEP pages, do not “Delete” the meeting because you will lose all of your work. The person who "arranged" the meeting can Edit the meeting type and the program will reassign the IEP forms based on the new meeting purpose. Any forms completed and saved that are not pertinent to the new meeting type can be deleted using the grey X in the Action Column to the right of the form.
- If the meeting purpose is changed after the IEP Notice has been sent to the parent, you **MUST** always send out a new IEP Notice with the correct meeting type.
- If a parent cancels a meeting and the forms have already been completed, do **NOT** delete the meeting in SIRAS or you will lose all of your work. There is a huge difference between deleting a meeting and rescheduling a meeting. If a parent cancels a meeting for a particular date, all you need to do in SIRAS is reschedule the meeting by changing the meeting date (and time/location if needed) and send out a new IEP Notice to the parents. The new information will be updated on the IEP Notice from the information you enter on the IEP Manager screen.
- If a meeting is suspended or not completed and needs to be continued to another date, do **NOT** change the meeting date or other information on the IEP Manager. Indicate in the meeting notes that the meeting was not completed and will be reconvened or continued on another date. If the date to continue the meeting is agreed upon, indicate the date, time, and location in the meeting notes. Whether or not the meeting date is agreed upon at the conclusion of the first meeting, you need to send out the “IEP Notice (Continued)” listed under Pre-IEP forms to the parents. Enter the new meeting date, time, and location for the reconvened IEP on this form so the original IEP meeting date is not changed. Be sure to print off the new IEP Notice for the file, and also print a new Agreement and Attendance page for each time the team meets.