

Annual Review Checklist

Complete the following pages for all AR meetings.

☐ **Conference Summary Report**

- ☐ You should document the third attempt to contact parents under #3.
- ☐ Enter "Three Day Draft" information.

☐ **Present Levels of Educational Performance**

- ☐ Enter information in all boxes. This information should set the stage for the rest of the IEP.
- ☐ Look back to the most recent Reevaluation with testing or Initial IEP to get information to share in the second to last box. It should include the date of testing, the name of test given, and a brief summary of the results.
- ☐ Cut and paste the "Adverse Effect" (last box) from the previous IEP. These are written by the School Psychologist and should not be changed unless they no longer describe the student and their needs. If this is the case contact your Supervisor ASAP.

☐ **Conference Goals and Objectives**

- ☐ Write measurable and observable goals based on the identified deficit.
- ☐ S.M.A.R.T. Goals should be skill-specific but not program specific.

☐ **Educational Services and Placement**

- ☐ This page is duplicated from the previous IEP. You should review it and make appropriate updates/changes.
- ☐ Be sure to include BIP, classroom or individual Aide, transportation, and School Health Services when needed under Related Services.

☐ **Educational Accommodations**

- ☐ This page is duplicated from the previous IEP. Review it and make updates.
- ☐ All accommodations must be based on the identified deficit area(s).

☐ **Assessment**

- ☐ This page is duplicated from the previous IEP. Review it and make updates.
- ☐ All accommodations must be based on the identified deficit area(s).

***Remember (as case-manager) you are responsible for sending the DRAFT IEP home to parents at least 3 days prior to the meeting. We recommend emailing it to parents.

To send a DRAFT IEP go to: "Print Forms" (blue button) then select "Print Options". From there check "Print DRAFT watermark on forms" (toward top of box). Select: "Present Levels, goals, accommodations, and assessments". Then hit "print" to generate a PDF and then download and email to the parent. This is also a great time to provide that 3rd reminder of the meeting!

Before every AR meeting report progress on previous goals. Then print and bring to the AR to be attached to the paperwork.

Annual Review/Reevaluation (AR/RE-AKA Everything Meeting of Review of Records) Checklist

Complete the following pages for all AR/RE meetings. The top portion will be just like the AR meeting checklist.

- ☐ Conference Summary Report
- ☐ Present Levels of Educational Performance
- ☐ Conference Goals and Objectives
- ☐ Educational Services and Placement
- ☐ Educational Accommodations
- ☐ Assessment

Additional Pages for the RE portion:

- ☐ Consent for Reevaluation
 - ☐ Complete the top portion of each Domain. Enter the most recent data (including the most recent formal assessment scores/data).
- ☐ Doc of Evaluation Results
 - ☐ AFTER you have completed the Consent for Reeval page then go to this page and hit the "Import Evaluation Data" blue button. **DONE!!**
- ☐ Doc of Intervention (SLD only)
- ☐ Eligibility Page(s) (never included in the Draft IEP that is sent home)
 - ☐ Depending on the Students Eligibility, you will complete the matching Eligibility pages. Review previous eligibility pages to help get an idea for what should be included.

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Before every AR meeting, report progress on previous goals. Then print and bring to the AR to be attached to the paperwork.

****Also, Progress Reports are sent home by case managers every quarter. Please be sure to report progress on all your goals/objectives every quarter and send these home. Try to coordinate with Related Service providers so that they know when you are sending them so that they have theirs completed in Embrace in time.**

Domain Checklist

There are times when we need Formal Evaluations completed by the School Psychologist.

- The student is 9 and will be aging out of the DD eligibility soon.
- The students' needs are changing and the current eligibility is no longer accurate or includes all the services they need.
- You or another team member have additional concerns in a related service area (OT, PT, SLP, SW, Behavioral)
- The student is meeting all goals and you are considering dismissing them from all services. (Formal evaluations are not required but sometimes helpful to confirm this important decision.)

When this happens make sure that the Supervisor knows ASAP so that a Domain meeting (which is just a request for additional testing and reasons for why it is needed) can be scheduled with all timelines in mind. Formal Evaluations take up to 60 school days to complete so when need as much advance notice as possible when an evaluation is needed.

As the Case-Manager, you will be responsible for completing the following pages:

☐ **Decision Re: Request for Evaluation**

- ☐ You will document the reason for this evaluation request (could be one of the above listed reasons).

☐ **Consent for Reevaluation**

- ☐ Complete all boxes, unless a Related Service provider is already seeing the student and then they will complete their corresponding domain. For example, the SLP will complete the Communication domain, OT or PT would complete the Motor domain, etc.

****Drafts are not sent home for Domain-only meetings.**

Initial IEP Meeting Checklist

If you are invited to an Initial IEP meeting that means that a Domain has already happened due to a suspected disability. The School Psychologist, and possibly other providers, have already completed all the testing and completed a majority of the IEP. Your responsibility is to review all the reports and data so that you can create goals and determine service minutes.

You will need to complete the following pages:

☐ **Goals/Objectives**

- ☐ Write measurable and observable goals based on the identified deficit.
- ☐ S.M.A.R.T. Goals should be skill-specific but not program specific.

☐ **Educational Services and Placement**

- ☐ Based on the goals, how much time do you need to complete them?

☐ **Educational Accommodations**

- ☐ The Psych might add some but you know your programs/classes best.
What accommodations might they need to access the curriculum?
- ☐ All accommodations must be based on the identified deficit area(s).

☐ **Assessment**

- ☐ The Psych might add some but review them and add whatever you know they will need.
- ☐ All accommodations must be based on the identified deficit area(s).

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Annual Review/Reevaluation (AR/RE-With Testing) Checklist

Complete the following pages for all AR/RE meetings. The top portion will be just like the AR meeting checklist.

- ☐ **Conference Summary Report**
- ☐ **Present Levels of Educational Performance**
- ☐ **Conference Goals and Objectives**
- ☐ **Educational Services and Placement**
- ☐ **Educational Accommodations**
- ☐ **Assessment**

Additional Pages for the RE portion:

The Domain/Consent for Reevaluation was completed prior to this day because testing was requested.

Psychologist will complete the eligibility pages.

- ☐ **Documentation of Intervention if SLD-Psychologist does not do this for a reevaluation.**

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