TCM TIDBITS

Did you know.... that you can open an Evaluation Summary document in myIDEA and enter your data there instead of opening the Eligiblity document and leaving it open for an extended period of time. The Evaluation Summary document can be opened and finalized multiple times.

Evaluation

Anytime you need to record data that could be used for future decisions and the eligibility is not due, you could open an Evaluation Summary document, add the data, then finalize. The information you enter will be saved in that document and will show up when opening a new Evaluation, Eligibility or Re-evaluation Data Review.

Evaluation and Eligibility
- Evaluation and Eligibility "Evaligibility" Document
- Last Eligibility Document Signed by the IEP Team
- Other pertinent information relating to eligibility
- Protocols for current evaluation or from previous evaluation if relevant to eligibility determination
- Evaluation Summaries if applicable

Evaluation and Eligibility

Move In

Status	PENDING	
* IEP Meeting Date	24-Apr-2017	
* Eligibility Date	02-May-2016	
* Eligibility	AUTISM	
Updated Date	19-Jan-2018	

As you use the "Move in button" [Move In] to enter information about a new student, make sure the dates you enter are the **meeting dates** and <u>not</u> the due dates.
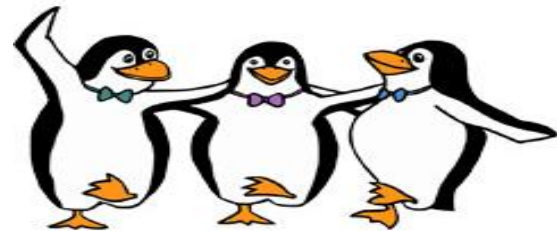

For more info about the Move-in procedure visit the PIE folder: https://tinyurl.com/move-in-dsd

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All files that are going through the LRE process, need to be checked by your TCM. This includes preschool files as well.

REMINDER! DO NOT FORGET TO FINALIZE

Finalize

SECOND TERM PROGRESS AND PUT A HARD COPY IN THE STUDENT FILE.

Another helpful tip: Have you considered moving IEP's up for transferring files? It would help you as well as the receiving schools to have those IEPs done with enough time for you to finish any needed changes and give your TCM time to check the file before it is transferred.

Please see the File Transfer Procedures and the 5 + 1* Reasons to Return a File for Compliance Errors available on the following pages.

Special Classroom, Preschool, Elementary and Secondary File Transfer Procedures

This document addresses the transfer of files from Pre-School to KG, 6th to 7th; 9th to 10th; 12th to transition programs. These guidelines include files for students in special classrooms (i.e. learning centers, functional skills) that will be transferred to a new school location. These guidelines do not apply to files where a change of placement to a more restrictive placement (self-contained classroom) is team decision.

1. Role of TCMs

- Review all files that will transfer between Special Classes (LC & FS), Preschool, 6th, 9th and if appropriate 12th grades. Complete a TCM Compliance Checklist for each file.
    - The checklist is kept outside of the special education record and transferred to the receiving school for their review.
    - The receiving school can destroy these after the corrections have been verified.
- Train and assist paperwork assistants in file management in the sending, receiving, and daily management of files.

2. Role of Sending Team (all Special Education Professionals involved in file transfers)

- Ensure each student has a current IEP which will not expire before November 1 of the next school year. This deadline is **applicable for all transferring students**, including those students transferring to the post-high programs housed at the Vista Education campus.
    - Complete the section of the IEP called "Change in Service Time when Education Level Changes." Specify how service time/location will differ for next year. Either mark that there is no change, or summarize the change in the text box.

- Complete the transition plan for all students turning 14 in the IEP year.
- Ensure that evaluation and student eligibility are current and that the eligibility is not due before November 1st of the next school year (for students who will transfer to a new setting).
- **Ensure that all open forms are finalized on myIDEA!**
- Review TCM File Compliance Checklist and correct all errors.
- Align the student's IEP services, placement, and proposed schedule. *(See 5 + 1* Compliance Reasons to Return a File).*
    - Complete change of placement indicating start date of next year if appropriate.
- Transfer **ALL** files (active and inactive) to the receiving school **no later than the last Friday in April of the current School Year. For the 2017-2018 school year, this is Friday, April 27, 2018. The receiving school should return any files that require corrections by May 11, 2018. Corrections are to be made and file returned by May 30, 2018** (See list of "Reasons to Return a File"). *Please note, these timelines differ for Learning Centers & Functional Skills whom hold file fairs on May 18th, 2018.*
    - Progress reports that haven't been completed can be sent via Pony to the receiving school after they're done.
    - Year round elementary schools need to follow this date because junior high teams need to review the files. Year round schools can still access records on myIDEA.
- Complete a File Transfer Log with a list of names indicating the active and inactive files being transferred. Keep one copy for your records and provide the receiving school a copy.
- **A Note for Special Classroom Teachers:** *Avoid involving the anticipated self-contained teacher. Sharing teacher names with parents and suggesting specific schools creates parental expectations for student placement that may not be fulfilled.*

Role of the Receiving Team (all Special Education Professionals involved in file receipt)

1. Review the School to School Transfer Form and the student files for compliance.
2. Receiving school can return ACTIVE files that require corrections within 10 contract days of date of receipt (See 5 + 1* Compliance Reasons to Return a File).
3. If there is a question regarding the file compliance, contact your TCM.
4. Corrections must be made and file returned by **May 30, 2018**.

Deliver files to SPECIAL EDUCATION DEPARTMENT PERSONNEL ONLY - not school custodian, office staff/secretaries

ACTIVE FILES CAN ONLY BE RETURNED WITHIN DISTRICT,
NEVER RETURN AN INACTIVE FILE OR A FILE FROM OUT OF DISTRICT
5 + 1* Reasons to Return a File for Compliance Errors

These are the compliance errors a file can be returned (in district) for correction:

Files can be returned to sending school within 20 contract days (not including summer break) of date of receipt.
After 20 contract days, file corrections are the responsibility of the new team.

1. IEP missing, overdue (or due prior to October 31 for Special Class, Preschool to KG, 6th, 9th and 12th grade transitions only) or does not contain service time that can be interpreted for the coming school year. The IEP might not have separate service time labeled beginning 7th grade year or 10th grade year. If it lists service time that can be provided at that level, it doesn't have to be defined by transition year.
2. Eligibility and Evaluation Summary ("Evaligibility") missing, incomplete or overdue (or due prior to October 31 for Special Class, Preschool to KG, 6th, 9th and 12th grade transitions only).
   a. If the student is an out-of-state move in and the move-in procedure was not followed by the receiving team, the file can be returned within 20 contract days of receipt.
3. IEP or Eligibility missing all signatures.
4. Consent for Initial Placement missing or appropriate change of placement if a change of placement will occur. (Do not return files for change of placement that has already happened, this cannot be corrected retroactively.)
   a. Consent for Initial Placement with a PARENT SIGNATURE must also be in the file for the out-of-state move in.
5. Correctable errors noted on the TCM checklist are not corrected. TCM checklists are not done for every in-district transfer. This applies to LRE Transfers and Grade Level Change Transfers. Do not return a file for a TCM checklist to be completed. *Some file compliance errors are not correctable, contact your TCM for support in determining the correct action to take in correcting the file.*

Plus 1*: IEP does not contain PLAAFP or Goals Related to Transition Areas (at least Post-Secondary Education and Career and Employment). Transition Plan is blank or incomplete, or graduation credit substitution information is not recorded on the IEP (<mark>for all students turning 14 or above in the IEP year</mark>).

Files should not be returned to schools for non-correctable errors.

These errors include:

1. Missing progress reports for any term but the current term. Contact the case manager and request relevant information or look for the archive on myIDEA. Upon receipt, file the information as appropriate.
2. Missing notice of meeting form or meeting summary form. If the notice of meeting form is archived in myIDEA, print the missing copy and place it in the student file.
3. Missing specific team members' signatures on forms (IEP, Eligibility, RDR, or Meeting Summary). It is unethical to get signatures on forms after the meeting has happened and could create a liability for the team if this practice was questioned. Missing signatures are NON-CORRECTABLE.
4. Teams disagreeing with RDR determination made by previous IEP teams. This is a team decision. When the receiving school becomes the IEP team upon student enrollment, if there is a concern about the RDR, it can be addressed by the new team. See the Policy and Information Exchange (PIE) document called [The Re-Evaluation Eligibility Determination Process – Considerations and Procedures](#) for additional information.
5. Missing medical or developmental history on an eligibility that is current. The receiving team will be responsible for obtaining medical/developmental history at the time of re-evaluation.
6. Missing At-Risk or Referral form.
7. Inactive files are never returned for correction.

Files should also not be returned for these easily correctable errors:

1. Missing Current Information
2. Missing Record of Access