

**Student Plans Information
Updated August, 2008**

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STUDENT PLANS INFORMATION

QUESTIONS & ANSWERS

Who do I contact for assistance with Student Plans?

1. To **add or assign public students** to a case manager call Susan Densmore at 202-6809 Ext. 1203, Teri Dingmann at 202-6800 Ext 1209 and Julie Gillen at 202-6837 Ext 1210. Students must be in SASI before they can be added to Student Plans.
2. To **add or assign non-public students** to a case manager, call Julie Gillen at 202-6837 Ext. 1210 or Susan Densmore at 202-6809. Julie or Susan will need to add them to SASI.
3. If you have other questions contact Ginia Meyer at 202-6806 Ext. 1212, Susan O'Connor Meyer at 202-6828 Ext. 1213 or Julie Gillen at 202-6837, Ext 1210.
4. If you forget your **password**, call Ginia Meyer at 202-6806 Ext. 1212.

What is the effective date of an annual IEP/IIIP?

Unless the parent objects to the proposed IEP/IIIP, you can implement an annual IEP 14 calendar days after the parent receives that IEP. Therefore, the **effective date of an annual IEP/IIIP** is usually 14 calendar days from the date the **parent receives** the IEP/IIIP. This is true even if that date falls after the last day of school (i.e, if you have a staffing at the end of May, the effective date would be in June).

What is the effective date of an initial IEP/IIIP?

For initial IEP/IIIP/IFSPs we suggest that the effective date be 14 days from when you send the plan to the parent. If you receive parent permission before the effective date, do not change the plan and service dates. This is recommended because we believe that the parent is giving permission for the IEP as it is written and because we want to eliminate the extra work involved in changing dates and sending the revised pages to the parents and the DAO. You should begin providing services on the effective date - do not provide services before the effective date. *(Updated 8/2007)*

Should the parent insist that services start prior to the proposed effective date, you will need to do a new IEP (with a new effective date, end date, and service dates) along with a new Notice of District's Proposed Action or Denial. *(Updated 8/2007)*

If you receive parent permission after the effective date, please change the plan effective date, plan end date, service start dates and service end dates. Send an updated copy to the parent and Julie Gillen at the DAO. As noted above, begin providing services on the effective date.

Should the parent insist that services start prior to the proposed effective date, do a new IEP (with a new effective date, end date, and service dates) along with a new Notice of District's Proposed Action or Denial.

If you receive parent permission after the effective date, please change the plan

effective date, plan end date, service start dates and service end dates. Send an updated copy to the parent and Julie Gillen at the DAO. As noted above, begin providing services on the effective date.

What is the effective date of a transfer IEP/IIIP?

The effective date for the Transfer IEP can be immediate - *it should be as close to the enrollment date as possible*. If the parent(s) agrees with the Transfer IEP, the parent(s) may sign the Notice of District's Proposed Action or Denial at the meeting.

How do I cut, copy, and paste text?

To cut text, block the text, and key Control X.
To copy text, block the text, and key Control C.
To paste text, block the text, and key Control V.

Why don't the adaptations, LRE and ESY print for students, birth-two, who are on IIIPs?

These options don't apply to Birth - Two students. You can type information into the fields but it will not print.

How do I print a document that has not been finalized?

1. Select the student. This will take you to the Spec Ed Case Information screen.
2. Select "Edit" in the table/matrix for the document. This will take you to the Information screen.
3. Select "Print (name of document)" from the purple menu on the left hand side of the page. It is the last item on the menu. The document will open up as a PDF document.
4. Click on the printer icon in the top upper left corner of the page to print the document.
5. The document will say "Draft" in the upper right hand corner of the page.
6. You can close the window by clicking the "☒" in the top right hand corner of the PDF window.

How do I copy an IEP?

1. Select the student. This will take you to the Spec Ed Case Information screen.
2. Select "Final" in the table/matrix for the current Education Plan. *Change the status to "Correct" and Submit*. This will take you to the Education Plan Definition screen.
3. *Click on Edit*. Change the "Plan End Date" to the day before the new plan will begin. Submitting will result in getting the message "Changing the Plan End Date caused one or more Service End Dates to be invalid. Click on 'Fix Dates' button to Automatically Fix Service Dates as part of these changes; Or click 'Cancel' to abort the changes you submitted."
4. Click on "Fix Dates" and submit. This will take you back to the Spec Ed Case Information Screen.
5. Select "Copy" in the table/matrix for the current Education Plan. This will take you to the Duplicate a Plan screen.

6. Change the "New Plan Effective Date" and the "New Plan End Date" to the desired dates for the new IEP. Click "Copy All?" or the sections of the IEP/IIP that you want to copy. Submitting will take you to the IEP Information screen for the new IEP.
7. Make changes in IEP sections as needed. At a minimum you will need to:
 - a. Change the date for the "Plan Meeting Date". If you don't change the "Plan Meeting Date" and you had an IEP meeting prior to making the changes, the meeting attendee information at the end of the IEP will be incorrect. (It will list the attendees from the previous IEP meeting notice). You may also need to change the "Plan Review Date".
 - b. Record your name as the IEP manager if needed. If you do not change this, the former IEP manager's name will show up as the IEP manager on the Notice of Proposed Action/Denial. You may also wish to change the school at this time.
 - c. Record changes in service dates (e.g., "Start Date" and "Anticipated or Actual End Date").
 - d. Answer the "Special Considerations" questions in the Adaptations section.
8. Select "Check Completeness". This will take you to the Education Plan Completeness Check.
9. Select "Pending" to make the new IEP pending. If you don't make the IEP pending, you will not be able to create a Notice of Proposed Action/Denial. This will take you to the Spec Ed Case Information screen.
10. Select "Create New Proposal Notice" in Notice of Proposed Special Education section.
11. Select the date of the plan that the proposal is for, enter the date of the proposal and submit. This will take you to the Notice of Proposed Action/Denial screen.
12. Complete the form and check completeness. Select "Finalize" on the Check Completeness screen.
13. When parent signature is received or the 14 calendar day parent response period has expired, you will need to inactivate the old plan and finalize the new plan. To **inactivate the old plan** click on "Final" in the table/matrix for that IEP, go to "Status" and select "Inactive". Submitting will take you back to the Spec Ed Case Information screen. You will notice that the IEP is not listed. Only Final reports are listed. You need to click on **Show Inactive** or **Show All** in the top right corner to get to Inactive reports.
14. Select "Followup" on the Notice of Proposed Action/Denial matrix/table for the new IEP. This will take you to the Notice of Proposed Action/Denial Followup screen.
15. Record the parent response, the date the parent signed the form, and the date you received the Notice on the Notice of Proposed Action/Denial Followup. Select "Special Ed" to get back to the Spec Ed Case Information screen.
16. To **finalize the new plan**:
 - a. Select "Pending" in the table/matrix for the Education Plan. This will take you to the Education Plan Definition screen.
 - b. Go to "Status" and select "Final".
 - c. Select Activated by: "Signature" or "Default" and record the signature date (the date you received Notice of Proposed Action/Denial from the parent) or the default date (last day of the 14 calendar day parent response period). If the signature date is different than the effective date, you do not have to change the effective date on an **annual** plan. (This only applies to students who are already

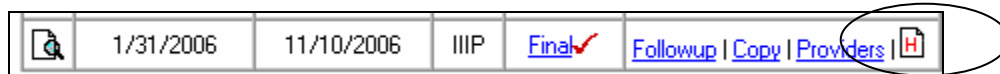
in service.) Submitting will take you back to Spec Ed Case Information where you will see that the IEP is now Final.

How do I terminate services on the IEP when a student exits from special education?

1. Select the student in Student Plans.
2. Click on "Create New Proposal Notice."
3. Enter the date of the Notice (if different from the default) and submit.
4. Leave the field "Proposal is for which plan?" blank.
5. Enter the meeting date and the reason for the Notice (*The school district recommends that all current special education and related services be discontinued....*).
6. The field "Deadline Date" has been added to indicate when the 14 calendar day parent response period will be up.
7. Provide an explanation of the proposed change by addressing all five items. You can not pass the completeness check if you do not complete all five item. Check completeness and finalize the notice.
8. Change the status of the IEP to inactive. The inactive IEP will not show up on your case information sheet unless you select "Show All" or "Show Inactive" in the top right hand corner. This will remove the student from your tickler list and from service provider's lists under My Services.
10. Change the student's status in Student Plans to inactive.
 - a. Select the student in Student Plans.
 - b. Select Student Information in the purple menu.
 - c. Select "inactive" from the drop down menu for Status.
 - d. This will remove the student from your active caseload.
11. The preceding information only outlines Student Plans procedures for the IEP and the Notice of Proposed Action/Denial when a student is terminating from all special education services. Remember that you still need to:
 - a. Send the Notice of Educational Evaluation/Reevaluation Plan to the parent.
 - b. Write a brief Evaluation Report.
 - c. Fill out the Status Change form (SE-51 on the web) and send a copy to the DAO.

How do I update service provider and IEP manager information in the IEP?

For **Final** IEP/IIIP/IFSP plans, a new 'Providers' link will appear on the page. Clicking this link will display a page that will allow you to replace service providers or to finish the service by splitting the original service period between providers. The original and modified plans will be saved in PDF history.



- Note: The change service provider screen has an additional feature where it allows you to update the items on the plan section and displays both the plan information and the current information.

Plan Type: **IEP**
 Effective Date: **1/1/2004**
 Plan End Date: **1/28/2004**

Update the following items on the plan with current values for the student:

	Plan Information	Current Information
<input type="checkbox"/> School	High School	Elementary School
<input type="checkbox"/> Grade	08	08
<input type="checkbox"/> Case Manager	District Administrator	0011 Administrator

- Ending service from one provider and assigning the service to another: If the original service provider assigned in the IEP did not provide the service for the whole period, a new provider can be selected to replace the original service provider for the remaining service period. For example, in the screenshot shown below, the student was scheduled to receive speech/language service by Christine Brunner from 1/1/04 to 1/15/04, but now Maureen Davis will be assigned the service starting on 1/10/04.

Choose new service providers as needed.
For each change, dates are required.
If there is no change, leave the new service provider name blank.

Service Provided	Dir/Ind	Frequency	Original Dates	Provider	Agency	First Day
Speech/Language	20 / 10	3 / Week	1/1/2004 1/15/2004	Davis, Maureen Original: Christine Brunner	District	1/10/2004

- After submitting the change, the plan now shows that the student received speech/language services by Christine Brunner from 1/1/04 to 1/9/04 and by Maureen Davis from 1/10/04 to 1/15/04.

Choose new service providers as needed.
For each change, dates are required.
If there is no change, leave the new service provider name blank.

Service Provided	Dir/Ind	Frequency	Original Dates	Provider	Agency	First Day
Speech/Language	20 / 10	3 / Week	1/10/2004 1/15/2004	← Original: Maureen Davis	District	
Speech/Language	20 / 10	3 / Week	1/1/2004 1/9/2004	← Original: Christine Brunner	District	

To replace the service provider for the whole period: If a new provider is selected and the first day is the same as the first date of the original date, only the provider will be changed. For example, in the screenshot shown below, the student was tentatively scheduled to receive occupational therapy by Administrator from 1/1/05 to 1/31/05, but the caseload was assigned to Christine Brunner on 1/1/2005.

**Choose new service providers as needed.
For each change, dates are required.
If there is no change, leave the new service provider name blank.**

Service Provided	Dir/Ind	Frequency	Original Dates	Provider	Agency	First Day
Occupational Therapy	0 / 10	1 / Week	1/1/2005 1/31/2005	Brunner, Christine Original: 0011 Administrator	District	1/1/2005

- After submitting the change, the plan now shows that the student will receive occupational therapy by Christine Brunner from 1/1/05 to 1/31/05.

**Choose new service providers as needed.
For each change, dates are required.
If there is no change, leave the new service provider name blank.**

Service Provided	Dir/Ind	Frequency	Original Dates	Provider	Agency	First Day
Occupational Therapy	0 / 10	1 / Week	1/1/2005 1/31/2005	 Original: Christine Brunner	District	

To view service provider changes: After returning to the student's special education document screen, click the History button to view the Service Provider changes

Select	Wright, Susan 2222222	Elemen	08	17 yrs	5/1/2007		Draft	1/1/2004 1/31/2004	
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A document history screen will display for that student

	Doc Date	Final Date	Doc Code	Lang Code	Student Name	Student ID	Gr	Sch	Create Date
	5/1/2007	8/3/2007 12:56:37 PM	IIIPPlan	011	Wright, Susan	2222222	08	998	5/11/2007
	5/1/2007	8/3/2007 12:46:25 PM	IIIPPlan	011	Wright, Susan	2222222	08	998	5/11/2007

Click on the PDF icon to view the IEP document that includes the change in service providers.

	5/1/2007	8/3/2007 12:46:25 PM	IIIPPlan	011	Wright, Susan	2222222	08	998	5/11/2007
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How do I use the Significant Change Plan?

When you write a new IEP, you need to indicate the plan type on the IEP information screen. The options are Initial, Continuing Annual Plan, or Significant Change to Plan. The "Significant Change to Plan" was added to help communicate to parents the changes that have been made on an **annual** IEP.

The "Significant Change to Plan" option operates differently than the old Significant Change form. Use this option when there is a need for a change in the annual IEP/IIIP prior to the end date of the annual IEP. For example, the IEP team met on Oct. 10, 2006, for an annual meeting on a student with both EBD and LD services. The end date of this IEP is Oct.26, 2007. Two months later, the team agrees that the student needs to increase the amount of behavior service but SLD needs remain the same. The team can choose to modify the annual IEP by choosing the "Significant Change to Plan" option, change the behavior service and leave SLD PLEP, goals and services the same. In this case the **annual end date of the Significant Change to Plan IEP remains the same as the previous annual IEP - Oct. 26, 2007.**

Remember that an IEP meeting must be held prior to making changes that are considered by law to be a "significant change". Minnesota Rules 3525.3600 states that a **significant change** in a program or placement requiring a notice to parent(s) and revision of the current IEP occurs:

1. When IEP goals have been changed, added, or deleted.
2. When there is need to add or delete any special education service based on a progress report and/or new evaluation data. This would include a related or support service.
3. When a change in site (e.g., education program, not a building change) or setting is proposed.
4. When the amount of time a learner spends with peers who do not have disabling conditions or who are not receiving special education services is reduced or increased.
5. When the team determines that there is a need for a conditional intervention procedure.

If you select the "Significant Change to Plan" option, you will need to identify the effective date of the annual IEP that you are making changes to and describe the changes in the text box. If you use this option, it is suggested that you copy the IEP you will be changing because you will need to end the current IEP and do a complete new IEP to pass the completeness check. Remember, **you should do a new annual IEP each year** - simply copying the old IEP and using the "Significant Change to Plan" option each year would not be in compliance with the requirements for current PLEPs and annual goals, etc.

1. Select the student. This will take you to the Spec Ed Case Information screen.
2. Select "Final" in the table/matrix for the current Education Plan. This will take you to the Education Plan Definition screen.
3. Change the "Plan End Date" to the day before the new plan will begin. Submitting will result in getting the message "Changing the Plan End Date caused one or

more Service End Dates to be invalid. Click on 'Fix Dates' button to Automatically Fix Service Dates as part of these changes; Or click 'Cancel' to abort the changes you submitted."

4. Click on "Fix Dates" and submit. This will take you back to the Spec Ed Case Information Screen.
5. Select "Copy" in the table/matrix for the current Education Plan. This will take you to the Duplicate a Plan screen.
6. Record the "New Plan Effective Date" and the "New Plan End Date". Click "Copy All?" or the sections of the IEP/IIIP that you want to copy. Submitting will take you to the IEP Information screen for the new IEP. Remember, if you are using this plan type, the plan end date should be the end date that the former IEP had before you changed it.
7. Make changes in IEP sections as needed. At a minimum you will need to:
 - a. Change the "Plan Meeting Date". If you don't change the "Plan Meeting Date" the meeting attendee information at the end of the IEP will be incorrect. (It will list the attendees from the previous IEP meeting notice).
 - b. Click the radio button next to "Significant Change to Plan dated" and record the effective date of previous annual IEP.
 - c. Summarize the changes you are making in the text box below "Summary of Significant Changes".
 - d. Make the agreed upon changes to the IEP.
8. Select "Check Completeness". This will take you the Education Plan Completeness Check screen.
9. Select "Make Pending" to make the new IEP pending. If you don't make the IEP pending, you will not be able to create a Notice of Proposed Action/Denial. This will take you to the Spec Ed Case Information screen.
10. Select "Create New Proposal" in Notice of Proposed Special Education section.
11. Select "Create New Proposal" to Add New Notice of Proposed Action/Denial" and complete the form.
12. Select the date of the plan that the proposal is for, enter the date of the proposal and submit. This will take you to the Notice of Proposed Action/Denial screen.
13. Complete the form and check completeness. Select "Finalize" on the Check Completeness screen.
14. When parent signature is received or the 14 calendar day parent response period has expired, you will need to inactivate the old plan and finalize the new plan. You will notice that the IEP is not listed. Only Final reports are listed. You need to click on **Show Inactive** or **Show All** in the top right corner to get to Inactive reports.
15. Select "Followup" on the Notice of Proposed Action/Denial matrix/table for the new IEP. This will take you to the Notice of Proposed Action/Denial Followup screen. Record the parent response.

CLARIFICATIONS & REMINDERS

- 1 The tickler list in Student Plans for IEP/IIIP is based on the "**effective date**" of the IEP/IIIP, not the IEP/IIIP meeting date. Make sure to schedule your meetings far enough in advance so that you will have time to complete the meeting, write the IEP, and send annual IEPs to the parent 14 calendar days before the current IEP expires. You may need to schedule your meeting three to four weeks before the

IEP expires in order to make sure that the new IEP goes into effect when the current one expires and that there is no lapse in service. Key points to remember:

A. The IEP should be written immediately - you do not have "ten days" or "fourteen days" to write the IEP.

B. The fourteen calendar days relates to the parent response period for an annual IEP/IIIP. The parent response period is the "14 calendar days after the parent is sent the Notice and the annual IEP/IIIP". You can proceed with the annual IEP/IIIP 14 days after the parent received the Notice of District's Proposed Services or Denial and the IEP/IIIP, if the parent has not returned the signed notice or objected to the annual IEP/IIIP.

2. You **do not need to change the service start dates on annual IEPs** when parents return a signed Notice of Proposed Action/Denial before or after the 14 day parent response period. We believe that parents are agreeing to the IEP as it is written.
3. Make sure that service start date and end dates on annual IEPs are consistent with the plan effective and the plan end date unless the service duration differs from the plan effective and plan end date. For example, a child who will transition to a new school in the fall would have a service end date that differs from the plan end date.
4. When you copy an IEP/IIIP, make sure to **update the meeting date**. If you don't, the people listed for the old meeting date will show up on the IEP.
5. The **Plan End Date** for education plans should be one day prior to one year from the effective date (or 364 days from the effective date).
6. The "**Report Date**" for the Evaluation Report should be the date of the eligibility staffing.
7. The **duration of the IEP** should generally be one year unless you have a specific reason to have a shorter duration (e.g., a transfer IEP would have shorter duration).
8. When **students move out of district**, change the end date on the IEP and inactivate the IEP.
9. Make sure to **finalize your IEP** after you receive parent permission or the parent response period has expired. If you don't finalize the IEP, it will show up as overdue.
10. When typing text in Student Plans, **do NOT use the < or >** characters. These characters are used by Student Plans in the programming of the web pages (specifically html coding). If you are experiencing text not being printed, it could be that you have a < or > somewhere in your text. It is suggested that you type out the words "less than" or "greater than" if that is what you are using these symbols to indicate.
12. If IEPs/ERs take a **long time to print**, shorten the paragraphs.

13. When you need to do a new IEP on students who have an IEP in Student Plans, create a new IEP or copy the current IEP. **DO NOT CHANGE THE DATA IN THE EXISTING IEP.** Before you can create or copy a new IEP, change the end date of the current IEP to the day before the effective date of the new IEP.
14. A text box for the **PLEP** is included on the Goal/Outcome page. Please record the PLEP that supports the goals and objectives in the PLEP text box. PLEPs that are not associated with specific IEP goals and objectives can be written in the regular PLEP section (e.g., data that describes motor functioning and supports the need for OT services which are described in the adaptation section). The format for IIEPs has not changed - all PLEP information is recorded in one section.
15. **Goals must be “annual” and PLEP’s need to reflect “present”** functioning levels. If you create a new IEP using the copy feature, make sure that you set new annual goals and update the PLEP if the duration of the new IEP will be for a year. If your goals and PLEPs remain the same, as they might in a Significant Change to Plan IEP, the duration should be based on the end date of the former IEP.

For example, the original IEP ran from September 5, 2006 to September 4, 2007 and you decide to develop a new IEP with an effective date of January 14, 2007 by copying the September, 2006 IEP. If the goals and PLEP will all remain the same, the end date for the new January 14, 2007 IEP should be September 4, 2007. If goals and PLEP are changed on the new January 14, 2007 IEP, the duration would be a year, so the end date for the new IEP would be January 13, 2008.

16. To make it easier to **search for goals and objectives**, a document containing the Student Plans Goal and Objective Bank is on the Student Services/Special Education web page.
 - a. Click on “Resources” on the left hand side of the Special Education web page.
 - b. Click on “Student Plans Goalbank”. This will take you to the Student Plans Goal and Objective Bank document.
 - c. Click on the goal area you want to review (e.g, academic performance). This will take you to the section of the document that lists descriptors for all of the goals in this area (e.g., “CONCEPTS - MONEY VALUE” is listed for the goal “ XXXX will increase money skills from currently needing adult assistance ^^ % of the time with identifying and understanding coins/bills and their values, to being able to identify coins/bills, values and count money independently with ^^ % accuracy”).
 - d. Click on the goal that you want to review. This will bring up the complete goal and associated objectives.
 - e. Clicking on “Top” will take you back to the top of the document.
 - f. You can also scroll through the document using the scroll bar.
 - g. Although this document is intended to be a reference you can block ¹ and copy goals and objectives. You will have to insert the student’s name and

¹ Tip on blocking text: Place your cursor at the beginning of the text you want to copy. Hold down the shift key. Click at

- gender in the goals and objectives. (Student Plans automatically does this when you search the library for instructional goals/outcomes).
- h. Please note that this is a very long document - if you print it you will get over 100 pages.
17. Carefully **consider assistive technology** on IEPs. We have seen IEPs where the statement, "Assistive Technology has been considered and is not needed" has been typed in assistive technology section, but other sections of the Adaptations list items that are considered to be assistive technology (e.g., pencil with an adaptive grip, a picture schedule, blocks for feet, etc.). We encourage you to review the document, Examples of Assistive Technology, if you have questions about what should be considered to be assistive technology. This document is available on the Student Services/Special Education page of the District website under Resources.
 18. **Boilerplates for the Eligibility Summary** portion of the Evaluation Report are available on the Special Education web page.
 - a. Click on "Resources" on the left hand side of the Special Education web page.
 - b. Click on "Eligibility Boilerplates". This will take you to the Eligibility Boilerplates document.
 - c. Click on the eligibility area you want to review (e.g, Specific Learning Disability). This will take you to the section of the document that contains this boilerplate. (Please note that the boilerplates have different formats because they were written by different people.)
 - d. You can block¹ and copy the section(s) you wish to use. The boilerplates use "***" for the student's name, and "^" to indicate where data/results should be inserted. Italics are used to identify instructions/reminders.
 19. If **changes** are made **to student information in SASI**, those changes will take effect the next day in Student Plans. SASI will only make those changes to reports that are in the **DRAFT** mode. If a report is in PENDING, FINAL or PENDING mode at the time Student Plans is populated by SASI, it will not be affected by any changes made from SASI.
 20. To ensure that team member **names show up on the Manifestation Determination** form:
 - a. Select the box on the Notice of Team Meeting that states, "to make a manifestation determination" .
 - b. Record who attended the meeting in the "follow up" section for the Meeting Notice.
 - c. Make sure that you have selected the correct meeting date when filling out the Manifestation Determination form.
 21. Our district has identified Academic Standards that special education instruction needs to address. Thus the section of the IEP/IIIP dealing with Academic Standards needs to be addressed for all new IEPs/IIIPs.

the end of the text you want to copy.

The options that would be selected most often would be:

“Will participate in the Minnesota Academic Standards as they are written. No changes will be made.” or,

“The IEP team has determined that some of the Minnesota Academic Standards are inappropriate. Some or all of student's IEP Goals and Objectives will replace the inappropriate academic standard(s) listed below.”

The academic standards can be found in the Curriculum, Instruction, and Assessment section of the District website under PreK-12 Academic Standards. You can block and copy the standards and benchmarks into the text box if needed.

Early Childhood Special Education would be most likely to use the option, “The IEP team has determined that because of the nature of the child's disability, all the Minnesota Academic Standards are inappropriate. The student's IEP Goals and Objectives will be the established alternative standard(s).” It should be used very rarely for students in grades K-12.