



Monroe County ISD Guidance: Documentation Checklist



The Monroe County Intermediate School District does not discriminate on the basis of religion, race, color, national origin, sex, disability, age, height, weight, marital status or familial status in its programs, activities or in employment. The following person has been designated to handle inquiries regarding the non-discrimination policies: Elizabeth J. Taylor, Assistant Superintendent for Human Resources and Legal Counsel, 1101 S. Raisinville Road, Monroe Michigan 48161; Telephone: 734.322.2640.

Monroe County Special Education Documentation Checklist

Transfer of Student with Disability

Any student with a suspected disability, meeting the McKinney Vento definition of Homeless, will require an expedited evaluation.

- Please note - **You must meet annual and triennial due dates.** No IDEA defined due dates are re-set with a Transfer of Student with Disability. There are no exceptions to federal timelines in this or any other circumstance.
- Complete New Student Form on the MCISD website to add student to your caseload in PowerSchool
 - [New Student Demographic Form](#)

Student Moves in from another school district in Monroe County- Complete the Transfer of Student with Disability document (PowerSchool Special Education - PSSE); if NO changes are necessary to the IEP; if there is NO evaluation need, then...

Select Option A: If the provisions of the current **Michigan IEP** will be FULLY implemented by the school district.

*This means you do not need to make ANY changes to the IEP (including program/building/minutes).

- Start date: The first day special education services are provided
- End date: 364 days from the date Notice was signed on the active IEP
- Notice: List any parent concerns that were not addressed in the document, Consideration of Assistive Technology, Communication Needs and Extended School Year
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
- Verify on PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the "Other" section of new documents, upload signed document to PowerSchool)
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Place all original documents in student CA60
- RMS and copy of original documents (including the Invitation) to Jacqui Venier at the ISD
 - MCISD Fax 734-242-5807 or school mail
 - [NEW! RMS-District 2017](#) [RMS-MSDS Tipsheet 2017](#)
- Follow procedures for distribution to appropriate personnel in your district

Student Moves in from a Michigan school district outside or inside Monroe County

Select Option B: An IEP Team meeting will be held and Notice provided within 30 school days. Until then, this student will be supported with the provisions listed above.

This gives you 30 days to get to know the student and their PLAAFP. Check that the goals are measurable, check the accommodations, etc. Familiarize yourself with the student and the document and make any needed changes via amendment within 30 days.

- Start date: The first day special education services are provided
- End date: 30 school days from first day that special education services were implemented
- Notice: List any parent concerns that were not addressed in the document, Consideration of Assistive Technology, Communication Needs and Extended School Year
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
- Medicaid Notification and Consent (PowerSchool: "Other" section of Create New Document; upload signed document to PSSE)

Make every attempt to obtain records from the prior school of attendance. If you **do not** receive records within **10 school days** follow the process for an Initial Evaluation.

- Complete REED and Notice (use flyout in REED document to access Notice)
 - Evaluation needs: If current data is insufficient, develop evaluation plan in REED, complete evaluation plan and follow procedures below within 30 school days
- Consult MCISD Guidelines and Procedures for Timely IEPs regarding extensions to initial IEPs
 - [MCISD Guidelines and Procedures for Timely IEPs](#)
- Eligibility Recommendation
- Reports (Uploaded to Eligibility Recommendation in PSSE)
- Medical opinion statement from MCISD website (as needed and uploaded to PSSE)
 - [OHI Medical Opinion](#)
- Invitation to IEP [See IEP Compliance Checklist](#)
- Individualized Educational Plan (IEP) [See IEP Compliance Checklist](#)
 - If eligible-complete IEP
 - If ineligible-complete Participants/Profile and Notice pages in the IEP
- Provide Parent Handbook and Procedural Safeguards

- [Parent Information Handbook](#)
- [Procedural Safeguards - MDE](#)
- Document in PowerSchool Special Education contact log
- Notice of non-attendance letter (if parent did not attend-See 10 day Parent letter on MCISD website)
 - [10-Day Parent Letter Initial IEP](#)
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
 - [NEW! RMS-District 2017](#) [RMS-MSDS Tipsheet 2017](#)
- Place all original documents in student CA60
- Follow procedures for distribution to appropriate personnel in your district

Any enrolling student to the district with expired eligibility and/or IEP must have an expedited REED, Evaluation, and IEP.

Student moves in from a state other than Michigan

Considered Initial to Michigan. Requires Review of Existing Evaluation Data and Consent to Evaluate (Always check the box for initial eligibility when coming from out of state), Eligibility Recommendation, Invitation to IEP, IEP team meeting held within 30 school days.

Select Option B: An IEP Team meeting will be held and Notice provided within 30 school days. Until then, this student will be supported with the provisions listed above.

- Start date: The first day special education services are provided
- End date: 30 school days from first day that special education services were implemented
- Notice: List any parent concerns not addressed in document (Consideration of AT, Communication, ESY)
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Medicaid Notification and Consent (PowerSchool "Other" section of new documents)
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
- Complete REED and Notice (use flyout in REED document to access Notice)
 - Notice of Sufficient Data: REED documentation supports Michigan eligibility. Use the [See IEP Compliance Checklist](#) to complete an IEP within 30 days. Follow with 10-Day Parent Non-

attendance letter (as needed), originals to the student CA60 and copies of the original documents to the ISD.

- Evaluation needs: If current data is insufficient, develop evaluation plan in REED, complete evaluation plan and follow procedures below within 30 school days
- Consult MCISD Guidelines and Procedures for Timely IEPs regarding extensions to initial IEPs
 - [MCISD Guidelines and Procedures for Timely IEPs](#)
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PSSE contact log
- Eligibility Recommendation (PSSE)
- Reports (Uploaded to Eligibility Recommendation in PSSE)
- Medical opinion statement as needed and uploaded to PowerSchool.
 - [OHI Medical Opinion](#)
- Invitation to IEP [See IEP Compliance Checklist](#)
- Develop and hold the IEP [See IEP Compliance Checklist](#)
 - If eligible-complete IEP
 - If ineligible-complete Participants/Profile and Notice pages of the IEP
- Notice of non-attendance letter (See 10 Day Parent letter on MCISD website)
 - [10-Day Parent Letter Initial IEP](#)
- Copy of all original documents in student CA60
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
- Follow procedures for distribution to appropriate personnel in your district

Any student coming into the district with an expired eligibility and/or IEP must have an expedited REED, Evaluation, and IEP.

Initial Eligibility (not currently eligible for Special Education and/or first time in Michigan)

*See below for Initial Evaluation in non-public

- Complete REED and Notice (use flyout in REED document to access Notice)
 - Evaluation needs: Develop a full and comprehensive evaluation plan, complete evaluation and follow the procedures below within 30 school days
- Consult MCISD Guidelines and Procedures for Timely IEPs regarding extensions to initial IEPs
 - [MCISD Guidelines and Procedures for Timely IEPs](#)
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)

- [Procedural Safeguards - MDE](#)
- Document in PowerSchool Special Education contact log
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
 - Complete the Agreement to Extend the Evaluation Timeline (found in PSSE) and obtain parent signature and Regional Director's signature
- Complete the Eligibility Recommendation (PSSE)
- Reports (Upload to Eligibility Recommendation in PSSE)
- Medical opinion statement as needed and uploaded to PowerSchool.
 - [OHI Medical Opinion](#)
- Invitation to IEP [See IEP Compliance Checklist](#)
- Develop and hold the IEP [See IEP Compliance Checklist](#)
 - If eligible-complete IEP
 - Medicaid Notification and Consent (PSSE "Other" section of new documents, Upload to PowerSchool)
 - If ineligible-complete Participants/Profile and Notice pages of the IEP
- Notice of non-attendance letter (if parent did not attend meeting-See 10 Day Parent letter on MCISD website)
 - [10-Day Parent Letter Initial IEP](#)
- Copy of all original documents in student CA60
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
 - [NEW! RMS-District 2017](#) [RMS-MSDS Tipsheet 2017](#)
- Follow procedures for distribution to appropriate personnel in your district

Reevaluation (Not Questioning Eligibility, No Additional Data)

- Begin team discussions 45 days prior to the eligibility/IEP due date
- Complete REED and Notice (use flyout in REED document to access Notice)
- Notice of sufficient data: REED documentation supports continued eligibility.
 - Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Invitation to IEP [See IEP Compliance Checklist](#)

- Develop and hold the IEP [See IEP Compliance Checklist](#)
- Verify on PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the "Other" section of new documents, upload signed document to PowerSchool)
- Notice of non-attendance letter (if parent did not attend meeting-See 7 Day Parent letter on MCISD website)
 - [7-Day Parent Letter](#)
- Copy of all original documents in student CA60
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
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Reevaluation (Questioning Eligibility, Additional Data Needed)

- Begin team discussions 45 days prior to the eligibility/IEP due date
- Complete a Review of Existing Evaluation Data and Consent to Evaluate (REED) complete Notice (use flyout to access)
 - Evaluation needs: Documentation is insufficient to support continued eligibility and requires additional testing, develop the evaluation plan, complete evaluation, and follow the procedures below within 30 school days
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Eligibility Recommendation (PSSE)
- Reports (Uploaded to Eligibility Recommendation in PSSE)
- Medical opinion statement as needed and uploaded to PowerSchool.
 - [OHI Medical Opinion](#)
- Invitation to IEP [See IEP Compliance Checklist](#)

- Develop and hold the IEP [See IEP Compliance Checklist](#)
 - If eligible-complete IEP and verify on PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the “Other” section of new documents, upload signed document to PowerSchool)
 - If ineligible-complete Participants/Profile and Notice pages of the IEP
- Notice of non-attendance letter (if parent did not attend meeting-See 7 Day Parent letter on MCISD website)
 - [7-Day Parent Letter Initial IEP](#)
- Copy of all original documents in student CA60
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
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Adding or Removing a Service

- Complete a Review of Existing Evaluation Data and Consent to Evaluate (REED) complete Notice (use flyout to access)
 - Evaluation needs: Documentation is insufficient to support addition or drop of service(s) and requires additional assessment, complete evaluation plan, conduct evaluation, and follow the procedures below within 30 school days
- Provide parent with Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Reports (Uploaded to Eligibility Recommendation in PSSE)
- Medical opinion statement as needed and uploaded to PSSE
 - [OHI Medical Opinion](#)
- IEP Amendment
 - If eligible-complete amendment or IEP and update Notice
 - If ineligible-complete Prior Written Notice; Options Considered (adding speech, adding OT, etc.) and Reason Not Selected (did not meet criteria, report attached)
 - Provide parent with Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
- Verify on PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the “Other” section of new documents, upload signed document to PowerSchool)

- RMS and copy of documents (including Invitation) to Jacqui Venier at the ISD
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Annual IEP Review

- Invitation to IEP [See IEP Compliance Checklist](#)
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
- Develop and hold the IEP [See IEP Compliance Checklist](#)
- Verify in PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the “Other” section of new documents, upload signed document to PowerSchool)
- Provide parent with Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Notice of non-attendance letter (if parent did not attend meeting-See 7 Day Parent letter on MCISD website)
 - [7-Day Parent Letter](#)
- Copy of all original documents in student CA60
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
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Revision/Amendment

- Open the finalized document you wish to amend
- Under “More” dropdown, select “Create Revision of this Document”
- Under “Purpose” select “Amendment” from the dropdown menu
- Document the date of the amendment
- On the Participant/Profile page, note the pages you are Amending in the IEP
- Make edits on associated pages **including** PLAAFP if you are updating info to provide rationale for a service or accommodation and an update to the Notice page
- A new Notice page will automatically generate. **Be sure your district representative signs the new Notice page**

- Finalize the revision
- Reports uploaded to the Amendment (as needed)
- Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Verify on PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the “Other” section of new documents, upload signed document to PowerSchool)
- Resource Program and Support Staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
- LBSE staff send RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
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Summary of Performance (SOP)

- Invitation to a Meeting (PSSE - Different than Invitation to IEP)
- The “Summary of Performance” is a requirement of the Individuals with Disabilities Education Act Regulations, 300.305(e). The SOP: Provides information to students who are graduating with a general education diploma to assist them in meeting their post-secondary goals; and provides information to students who are leaving school because they exceed the age of eligibility for a free appropriate public education (end of school year in which they turn 26).
- The MDE/OSE-EIS recognizes that the SOP is most useful when the student has the opportunity to actively participate in its development when linked to the Individualized Education Program (IEP) and the Education Development Plan (EDP) process.
- The final document should be given to the student during an exit interview meeting that adequately reviews with the student the contents of their SOP, its intended use, and to answer questions.
- Directions for SOP Form (Found in PSSE under Create New Documents)
 - Complete the student information section of the form. Include a summary of the student’s academic achievement and functional performance, reviewed and updated from the most recent IEP. This statement may include:
 - How the student’s disability has affected the student’s academic achievement and functional performance and progress in the general education curriculum.
 - The student’s academic and functional strengths.
 - The results of the student’s vocational and transition assessments.
 - The results of the student’s most recent state or district assessments
 - The results of any college entrance examinations (e.g. SAT, ACT)

- The results of the most recent special education reevaluation.
 - Whether the student is graduating with a general education diploma.
 - A description of any other exit document the student earned in high school.
 - Honors or special awards the student achieved in high school.
 - Vocational or extracurricular accomplishments of the student.
 - List the student's post-secondary goals, reviewed and updated from current IEP.
 - Write recommendations for assisting, supporting, and/or accommodating the student in meeting the student's post-secondary goals after the student exits from K-12 education.
 - These recommendations may include accommodating the student's disability in the workplace, post-secondary education setting, etc.
 - Enter the name of the person(s) completing the SOP, name of the school, a contact phone number, date of completion of the document, district representative signature.
 - Student signature and date indicating receipt of a copy of their SOP.
- Prior Written Notice stating the student will no longer receive special education supports and services due to graduation with a high school diploma or they exceed the age of eligibility for a free appropriate public education.
 - Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
 - Copy of all original documents in student CA60
 - Resource Program and Support Staff send RMS and copy of original documents (including invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
 - LBSE staff send RMS and copy of original documents (including invitation) *within 7 days* of the meeting to your Regional Secretary at the ISD
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Pattern of Removal and Manifestation Determination

- [See MCISD Guidelines for Discipline for Students with Disabilities](#)
 - [Interim Alternative Educational Setting \(IAES\) Guidance](#)
- Contact your Regional Director of Special Education

Non-Public Transfer of Student with Disability

Any student coming into the district with an expired eligibility and/or IEP must have an expedited REED, Evaluation, and IEP.

- Please note - **You must meet annual and triennial due dates.** No IDEA defined due dates are re-set with a Transfer of Student with Disability. There are no exceptions to federal timelines in this or any other circumstance.
- Complete New Student Form on the MCISD website to add student to your caseload in PowerSchool
 - [New Student Demographic Form](#)
- District Representative is you or, when present, your Regional Director of Special Education
- Your Regional Director of Special Education is the District Designee who signs the Notice page
- Follow same procedures used for Transfer of a Student with a Disability for
 - In count
 - Out of county
 - Out of state

Nonpublic: Initial Eligibility (not currently eligible for Special Education and/or first time in Michigan)

Any student coming into the district with an expired eligibility and/or IEP must have an expedited REED, Evaluation, and IEP.

- District Representative is you or, when present, your Regional Director of Special Education
- Your Regional Director of Special Education is the District Designee who signs the Notice page
- Complete a REED (found in PSSE) and Notice (use flyout in REED document to access)
 - Evaluation needs: Develop a full and comprehensive evaluation plan in the REED, complete the evaluation plan, and follow the procedures below within 30 school days
- Provide parent with Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Authorized Release/Exchange of Information (as needed)
 - [Authorization to Release Student Education Records](#)
 - [Authorization to Release Student Education Records - Students 18 and Older](#)
- Consult MCISD Guidelines and Procedures for Timely IEPs regarding extensions to initial IEPs
 - [MCISD Guidelines and Procedures for Timely IEPs](#)
 - Complete the Agreement to Extend the Evaluation Timeline (found in PSSE) and obtain parent signature and Regional Director's signature
- Eligibility Recommendation (PSSE)

- Reports (Uploaded to Eligibility Recommendation in PSSE)
- Medical opinion statement as needed and uploaded to PowerSchool.
 - [OHI Medical Opinion](#)
- Invitation to IEP [See IEP Compliance Checklist](#)
- Develop and hold the IEP (resident district; resident building) [See IEP Compliance Checklist](#)
 - If eligible-complete IEP
 - Medicaid Notification and Consent (PSSE "Other" section of new documents, Upload to PowerSchool)
 - If ineligible-complete Participants/Profile and Notice pages of the IEP
- Notice of non-attendance letter (if parent did not attend meeting-See 10 Day Parent letter on MCISD website)
 - [10-Day Parent Letter Initial IEP](#)
- Parent declines consent to implement resident district IEP and offer for programs and services
- K-12 Nonpublic Special Education School Plan
- Copy of all original documents in student CA60
- RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
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- Follow procedures for distribution to appropriate personnel in your district

Non-Public Reevaluation (Not Questioning Eligibility, No Additional Data)

- Begin team discussions 45 days prior to the eligibility/IEP due date
- Complete a Review of Existing Evaluation Data and Consent to Evaluate (REED) complete Notice (use flyout to access)
 - Notice of sufficient data: REED documentation supports continued eligibility or discontinuing eligibility.
 - Provide Parent Handbook and Procedural Safeguards
 - [Parent Information Handbook](#)
 - [Procedural Safeguards - MDE](#)
 - Document in PowerSchool Special Education contact log
- Invitation to IEP [See IEP Compliance Checklist](#)
- Develop and hold the IEP (resident district; resident building) [See IEP Compliance Checklist](#)
 - If eligible-complete IEP
 - Medicaid Notification and Consent (PSSE "Other" section of new documents, Upload to PowerSchool)
 - If ineligible-complete Participants/Profile and Notice pages of the IEP

- Notice of non-attendance letter (if parent did not attend meeting-See 10 Day Parent letter on MCISD website)
 - [10-Day Parent Letter Initial IEP](#)
- Parent declines consent to implement resident district IEP and offer for programs and services
- K-12 Nonpublic Special Education School Plan
- Copy of all original documents in student CA60
- RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
 - [NEW! RMS-District 2017](#) [RMS-MSDS Tipsheet 2017](#)
- Follow procedures for distribution to appropriate personnel in your district
- Develop and hold the IEP [See IEP Compliance Checklist](#)
- Verify on PSSE in Student Profile that Medicaid Notification and Consent is on file. If not create a new document under the “Other” section of new documents, upload signed document to PowerSchool)
- Notice of non-attendance letter (if parent did not attend meeting-See 7 Day Parent letter on MCISD website)
 - [7-Day Parent Letter](#)
- Copy of all original documents in student CA60
- RMS and copy of original documents (including Invitation) *within 7 days* of the meeting to Jacqui Venier at the ISD
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- Follow procedures for distribution to appropriate personnel in your district