Required Paperwork for Student File - Evaluation

Indicate (√) which forms you are attaching / Write N/A for “not apply”

Student \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Home District \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Case Manager \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Paperwork** | **Sent home to parents** | **Finalized in SpedForms** | **Filed in cumulative file** |
| **Referral Form** (if initial evaluation) |  |  |  |
| **Notice of a Team Meeting** (optional) |  |  |  |
| **Evaluation / Re-evaluation Plan Prior Written Notice** (2 pages) |  |  |  |
| **Parental Consent / Objective** \*\*Automatically prints out and finalizes with the Evaluation / Re-Evaluation Plan  \*\*Special Education Data Sheet prints. |  |  |  |
| **Evaluation Report  \*\***Make sure that the final page has the correct “eligibility” / “ineligibility” checked  \*\*Check that the Primary Disability has been chosen  \*\*MUST HAVE signatures from team for SLD evaluations |  |  |  |
| **Prior Written Notice** \*\*Required for an EXIT / DISMISSAL evaluation  \*\*Required for an initial evaluation when student is found NOT ELIGIBLE (no consent needed) |  |  |  |
| **Protocols** Testing protocols used for evaluation |  |  |  |
| **Record Retention & Destruction**  \*\*Paperwork is important when dismissing from all special education services, graduating, aging out, or moving |  |  |  |
| **Other Forms as Needed** – if evaluation resulted in termination of ALL special education services |  |  |  |
| **Final Progress Report for Prior IEP** |  |  |  |
| **ECSE Child Outcomes Survey** (for ECSE students exiting from Part B services) |  |  |  |
| **Records Retention & Destruction form** (get signatures) |  |  |  |
| **Communication Log** (if needed) |  |  |  |

\*\*If initial evaluation resulted in an IEP, see back side

**IEP following an Initial Evaluation or Re-Evaluation**

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| **Paperwork** | **Sent home to parents** | **Finalized in SpedForms** | **Filed in cumulative file** |
| **Notice of a Team Meeting** |  |  |  |
| **Record of a Team Meeting or Signature Sheet**   * Signatures or initials not checkmarks |  |  |  |
| **Agreement Regarding IEP Team Member Attendance** (if necessary) |  |  |  |
| **IEP:**  Include Entire IEP  BIP or PBSP if needed  Transition Pages for students during 9th grade or before if included in the evaluation |  |  |  |
| **Prior Written Notice (PWN**) Count 14 days from the prior written notice date (date sent/given to parent). This is the start date to use on the service page. |  |  |  |
| **Parental Consent/Objection – Annual IEP** Finalizes with Prior Written Notice (If no parent signature, write “Implied consent after 14 calendar days” and sign your name). |  |  |  |
| **Parental Consent/Objection – INITIAL IEP** Finalizes with Prior Written Notice – MUST obtain parent signature for an initial IEP before providing services |  |  |  |
| **Special Education Data Sheet** – automatically prints out with Prior Written Notice & Consent.  Give to MARSS Coordinator |  |  |  |
| **Final Progress Report – Annual IEP** for prior IEP |  |  |  |
| **Other Forms as Needed** |  |  |  |
| **Emergency Health Information** (if student will be starting Special Transportation: Code 03) |  |  |  |
| **Extended School Year Services** |  |  |  |
| **Notice of Transfer of Parent Rights** (1 year before the student turns 18) |  |  |  |
| **ECSE Child Outcomes Summary** (for ECSE students entering Part B or exiting ECSE) |  |  |  |
| **Communication Log (if needed)** |  |  |  |
| **Third Party Billing (MA) consent** if student has a billable service and no signature is on file |  |  |  |