Initial Evaluation for Special Education Services
Using the Eligibility Process in EDplan

ELIGIBILITY PROCESS: Preliminary Decision and Meeting Notice / Invitation
- Case Manager is assigned at SBIT meeting where referral is made.
- Case Manager signs into EDplan
- Go To ELIGIBILITY PROCESS
- Begin with “Preliminary Decision and Meeting Notice / Invitation”
- Document the referral by entering in all information regarding the referral.
- Click “Referral for Evaluation, Review of Existing Data and Parental Consent”
- With parent document and IEP Team, complete this portion of ELIGIBILITY PROCESS
- Print out documents and secure signatures from team and consent from parent.
- Click “Prior Written Notice” to summarize the referral for a re-evaluation.
- All related documents are copied. One set provided to parents.
- Originals are placed in educational record.

COMMUNICATION / PLANNING
- Chairperson designated.
- Chairperson communicate with disciplines evaluating or reviewing data (i.e. date of meeting, accommodations for parent needed for participation, special considerations)
- Chairperson schedules Eligibility Meeting with team and parent.
- Chairperson signs into EDplan
- Go To ELIGIBILITY PROCESS
- Clicks “Preliminary Decision and Meeting Notice / Invitation”
- Documents scheduling of meeting with parent by completing this step in the process.
- Print meeting notice and mail to parent.
- Place a copy in the student’s educational record.
- Chairperson confirms meeting date, time and place with IEP team.
- Team determines if it will use “Reports” in EDplan’s Eligibility Process

OPERATING PROCEDURES
- Chairperson prepares for meeting by printing and/or reviewing “Disability Worksheets” in ELIGIBILITY PROCESS in EDplan prior to meeting.
- Introductions (name and role at meeting).
- Review of data by discipline, facilitate meeting in context of criteria.
- Essential deliberations and decision documented using EDplan.
- Chairperson signs into EDplan and clicks “Eligibility Summary and Determination”

DATA AND DOCUMENT PROCESSING
- Chairperson completes (and finalizes) all worksheets for which the student is eligible.
- Chairperson completes (and finalizes) the Prior Written Notice.
- Team and parent signatures secured
- All documents are copied.
- One set provided to parents.
- Originals are placed in educational record.
- Parent “Response” to eligibility outcome is recorded in EDplan.

(If student is 18 years old or older, “parent” means “adult student”.)

Finalized: 10/10/14
Amended:
Reviewed: