	Indiana IEP Walkthrough for Multidisciplinary (MD) Team Members

IIEP MAIN PAGE
CREATE CASELOAD
1. From the Main Page, select Wizards from the gray menu bar at the top of the screen
2. Select Caseload Setup Wizard
3. To add students to the caseload click the button at the bottom of the screen labeled, "Add More Students to Caseload"

Note. To "Add More Students to Caseload"
   a) Enter search criteria
   b) Click View Students button
   c) Students meeting search criteria display on screen
   d) Check either TOR/Case Manager or Team Member for the students
   e) Click Add Students to Caseload button at the bottom
or, Add Students to Caseload, then find more to complete another student search and add more students

4. Change the location of the check and update database to change from TOR/Case Manager to Team Member and vice versa
5. Remove both checks for a student to remove them from the Caseload
VIEW CASELOAD
1. Select Students from the gray menu bar at the top of the screen
2. Click View My Caseload
3. TOR/Case Manager or Team Member Caseload appears

Note.
   a) To add or remove students from this list see - **Create Caseload**
   b) Click on the header of any column to sort by that information
      i) By default, the list is sorted by student name with the TOR's students listed first
      ii) Any students assigned to the user as Teacher of Service are listed next
Click the header of the first column (CP) for a detailed explanation of the compliance symbols

ACCESS THE REFERRAL PROCESS
1. From the Caseload list, click a student's name
2. Select a reason for access and Click continue
3. From the Blue Student Menu, select Referral Process
PRE-CONFERENCE PLANNING
1. Click Pre-Conference Planning from the Blue Student Menu
2. Click Type of Evaluation

Note.
   a) Select the Purpose of meeting that best corresponds to the Referral Request
      a. More information may be required depending upon the purpose selected
         i. Reevaluation requires selection of the reason for reevaluation
         ii. Move-in requires enrollment date

1. This purpose is useful if an evaluation had already begun in a previous district
b) Multiple purposes may be selected
c) Initial (First Steps) is available based on the student's age
d) IIEP will not allow some combinations of purposes
a. Reevaluation and Initial may not be selected, for example

3. IIEP may prompt for additional information on this page based on the purpose.
4. Click: <SAVE> **OR** < SAVE & CONTINUE >
Note. As with all pages in IIEP, Conference Notes are available
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d) If all parts are complete, IIEP advances to the next page

EXISTING DATA
1. Describe strengths of the student
2. Describe the concerns of the parent for enhancing the education of the student.
3. **<For Initial Conference Following Failed Response to Intervention only>** Record information regarding the instructional strategies and research-based interventions in which the student participated
4. Review Progress Monitoring Data and report student growth and progress toward annual goals.
5. Record any the academic and functional present levels for the student.
6. Click: <SAVE> **OR** < SAVE & CONTINUE >
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REFERRAL DECISION
1. Enter the Referral Date
2. Select the Referral Source
a. Parent/Legal Guardian
b. School/Public Agency
3. Click 'Finalize Referral' to finalize the referral and create a Referral Event in IIEP
4. Click "Yes" in the popup window to confirm Finalization of Referral event
5. Enter Factors Considered
a. Capture all relevant data to the decision to confirm or refuse the request to evaluate
6. Based upon the Factors Considered, select the public agency's response to the request to conduct an educational evaluation

Note.
a) Choose "Yes" to confirm the request to evaluate
a. School/Public Agency requests are automatically confirmed
b. Document the decision to conduct the evaluation
b) Choose "No" to refuse a request to evaluate
a. Document the decision to refuse to evaluate
b. All Notices may be printed in Spanish or English
i. If Spanish is selected, IIEP will print two copies. One copy will print in Spanish and the other in English
c. Create Draft or Final Notice of Evaluation Refusal
i. This halts the process and creates an evaluation refusal event in IIEP
7.   Click: <SAVE> **OR** < SAVE & CONTINUE >
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ELIGIBILITY CATEGORIES AND ASSESSMENTS
1.   Indicate the Suspected Disability Categories
2.   Multiple Categories may be selected
3.   All required assessment domains are automatically selected under 'Assessment Domains to be Investigated for this Evaluation
4.   'Create Draft or Final Notice of Evaluation'
Note. Button name will reflect selected process
a)   Notice of Reevaluation
b)   Notice of Initial Evaluation
c)   Notice of Initial Following …
5.   Click: <SAVE> **OR** < SAVE & CONTINUE >
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EVALUATION PROCESS
CREATE MULTIDISCIPLINARY (MD) TEAM
1.   Current Teacher of Record/Case Manager should display the current Case Manager
a)   To change this select the new Case Manager from the dropdown list
2.   Click the "Select Team" button to choose the Case Conference Committee Team
3.   Update Team Page
Note. Current TOR/Case Manager is listed
a) List of Parent(s) and/or Legal Guardian(s) who will receive IEP Information appear

b) *Users within IIEP that may access IEP data at this school*
a. *check users that will be a part of the CCC team*
b. *check the view only box to limit team member access to read only*
c) *Once all information is accurately recorded, click "<Save>" or "<Save & Continue>"*
a. *If all parts are complete, IIEP returns to Create CCC Team*
4. To add or edit the CCC team click the "Select Team" button
5. Click: <SAVE> ***OR*** < SAVE & CONTINUE >
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ASSIGN MD TEAM ROLES
1. The required multidisciplinary team members are listed based upon the selected disability categories
2. Click the dropdown box beside each listed role to assign a team member
3. Click: <SAVE> ***OR*** < SAVE & CONTINUE >
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PARENT CONSENT CONTACTS
1. Record the parent's response to the request to evaluate.
2. Record the date signed consent to evaluate was received by the School/Public Agency
3. Identify the communication entry or entries that corresponds to the request to evaluate
4. Click: <SAVE> ***OR*** < SAVE & CONTINUE >
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5. **If the parent or legal guardian refused to consent to evaluation, the process ends by clicking "<Save & Continue>"**
6. ***If the parent or legal guardian revokes consent to evaluate, change consent to "No" and the consent date to reflect the refusal date***
EXISTING DATA
1. Describe strengths of the student
2. Describe the concerns of the parent for enhancing the education of the student.

3.	**\<For Initial Conference Following Failed Response to Intervention only\>** Record information regarding the instructional strategies and research-based interventions in which the student participated
4.	Review Progress Monitoring Data and report student growth and progress toward annual goals.
5.	Record any the academic and functional present levels for the student.
6.	Click: \<SAVE\> *OR* \< SAVE & CONTINUE \>

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	ASSESSMENT DATA
1.	Upload any reports, documents, or assessments relevant to the student evaluation
2.	All uploaded documents will be listed
3.	Enter start and end date of each assessed domain
4.	Record the instrument(s), evaluator(s), and end date(s) for each assessment tool
5.	Document the findings of each tool in the Narrative space for each domain
6.	Provide a synthesized summary of all assessments completed or reviewed
7.	Click 'Create Final Education Evaluation Report'
8.	All Notices may be printed in Spanish or English
9.	Click: \<SAVE\> *OR* \< SAVE & CONTINUE \>

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	NOTICE OF INITIAL FINDINGS AND PROPOSED ACTIONS (INITIAL EVALUATIONS ONLY)
1.	Complete each text area in response to the prompts provided
2.	Click: \<SAVE\> *OR* \< SAVE & CONTINUE \>

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3.	Notice of Initial Findings and Proposed Actions prints as part of the Notice of Case Conference for Initial Case Conferences.