

Individual Education Plan (Massachusetts)

Last Modified on 11/07/2024 1:42 pm CST

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Tool Search: Special Ed Documents

The Individual Education Plan is used to capture student special education plan information and match the required documentation provided by the state of Massachusetts. This document describes each editor, a description of each field on the editor, and any special considerations and instructions.

The current format of this document is the **MA IEP 2024**. Plan formats are selected in [Plan Types](#).

Editor Home - **MA IEP 2023 ⓘ

| NAME | STATUS | MODIFIED BY | COMPLETED BY |
|-----------------------------|-------------|---|--------------|
| Plan Header (ADM-1) | IN PROGRESS | System Administrator 12/27/23 11:16 AM | > |
| Enrollment Information | IN PROGRESS | System Administrator 12/27/23 12:26 PM | > |
| Student Information | IN PROGRESS | System Administrator 12/27/23 12:27 PM | > |
| Parent/Guardian Information | IN PROGRESS | System Administrator 12/27/23 12:32 PM | > |
| Student and Parent Concerns | IN PROGRESS | System Administrator 12/27/23 12:37 PM | > |
| Student and Team Vision | NOT STARTED | | > |
| Student Profile | IN PROGRESS | System Administrator 12/27/23 12:42 PM | > |
| PLAAFP: Academics | NOT STARTED | | > |

Editor Home

Editor Home

The Editor Home lists the editors available, their status, and Modification and Completion information.

| Header | Description |
|---------------------|---|
| Name | The name of the editor. |
| Status | <p>The state of the editor. Statuses can be:</p> <ul style="list-style-type: none"> • In Progress indicates a user has entered and saved data in that editor. • Not Started is the default status for all editors. • Complete indicates a user has clicked the Complete button on the editor, and the editor is read-only. This does not lock the editor from further editing but indicates the user considers the editor finished. • Not Needed indicates a user has clicked the Not Needed button on the editor. This is usually done for editors that do not apply to the student. <p>The following statuses are only available for certain state-specific documents:</p> <ul style="list-style-type: none"> • ESign indicates that the editor has functionality related to the eSignature process. See the Nevada Individual Education Plan eSignature Process or Delaware Special Ed Plan eSignature Process articles for additional information. • Complete Pending eSignature indicates the plan has been entered and sent via the Campus Parent portal to the student's guardian for eSignature. |
| Modified By | The date and the user by whom the editor was last edited. |
| Completed By | The date and the user who clicked the Complete button for that editor. |

General Information

The following table lists the actions available for the editors. When resizing the window, certain buttons are condensed into a single **Action** button.

| Button | Description |
|-------------|--|
| Save | <p>Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor.</p> <ul style="list-style-type: none"> • Save captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the Editor Types section for additional information. • Save & Stay captures progress and keeps the user on the current editor. This save button is the default save option and is usually found within the detail screen or list editors, such as Goals and Objectives. • Save & Next captures progress and navigates the user to the next editor. • Save & New captures progress and creates a new record. This save button is usually found within the detail screen of a list editor, such as Goals and Objectives. See the Editor Type section for additional information. |

| Button | Description |
|-----------------|--|
| Refresh | <p>Retrieves a new copy of data from the student's record. This includes enrollment, student, parent/guardian, and team member information. This also returns any accidentally deleted records. Manually entered fields do not change when the refresh button is clicked. The user must Save after clicking Refresh to capture changes.</p> <p>A side panel displays a listing of all the student's applicable enrollment records. See the Enrollments tool documentation for additional information.</p> |
| Cancel | Navigates the user to the Editor Home screen or the List Screen for List editors. |
| Status | <p>Changes the status of the editor.</p> <ul style="list-style-type: none"> • Complete indicates the editor is finished. This makes the editor read-only. However, this does not lock the editor from further editing. The user must click In Progress to further edit after an editor is marked Complete. • Not Needed indicates the editor does not apply to the student's plan or evaluation. This makes the editor read-only. However, this does not lock the editor from further editing. Click the In Progress button to further edit after an editor is marked Not Needed. • In Progress only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made. <p>The following status is only available for the Nevada IEP:</p> <ul style="list-style-type: none"> • Complete Pending eSignature only displays for the Procedural Safeguards, IEP Implementation, and Medicaid Consent editors. This button marks the editor as complete until the parent/guardian electronically signs those sections of the plan via the Campus Parent Portal. See the Nevada Individual Education Plan eSignature Process or Delaware Special Ed Plan eSignature Process articles for additional information. |
| Print | Prints the entire document. |
| Editors | Opens a side panel listing all the available editors and their status. Select an editor from this list to navigate to that editor or click Close to collapse the side panel. |
| Previous | Navigates the user to the previous editor. |
| Next | Navigates the user to the next editor. |

Editor Types

There are two types of editors available: List or Basic editors. When navigating to a Basic editor, the list of fields within the editor is displayed. List editors display a list of all records within that editor. Clicking an existing record or the **New** button opens the detail view for an individual record.

Editor Lock Out and Release Logic

Only one user at a time can actively work on an editor. A person with a padlock icon () displays in the Editors side panel, Editor Home, and List Screen of list editors indicating which editors currently have users working on them. Hovering over the icon displays the name of the user who has checked out the editor, including the current user (you).

Editors that are currently being edited are read-only for all other users. The name of the person working on the editor displays in the header.

To release an editor, the user must:

- navigate to the next editor by clicking **Save and Next** or the **Editors** button and selecting the next editor from the side panel.
- click the **Cancel** button to return to the Editor Home screen.
- log out of the Campus application.
- navigate to a different tool in the Campus application.

Editors are automatically released when the in-application timeout limit has been exceeded. This is a back-end process and is usually around 30-60 minutes.

Template Banks

Certain fields within several editors have an **Add Template** icon that displays next to their name. Clicking this button displays a side panel with the available library of predetermined text for that field. [Template Banks](#) are managed in System Administration.

Transition Goals and Services: Postsecondary

Sequence Number
1

Area*
Postsecondary Education and Training Goal

Goal: Add Template

Reading Goal

Courses of Study Add Template

Template Banks

| Categories | Sequence | Selected Template Bank Values |
|---|----------|-------------------------------|
| + Course of Study English (4 Templates) | | No records selected. |
| + Course of Study Math (4 Templates) | | |

Save & Stay Cancel Insert Selected Template(s) Clear Selected Template(s) Cancel

Template Bank Side Panel

Click the plus (+) icons next to the category to view the available template values.

Template Banks

| Categories | Sequence | Selected Template Bank Values | | | | | | | | | | |
|--|---|---|------------------------------------|--|------------------------------------|--|------------------------------------|--|------------------------------------|--|---|---|
| - Course of Study English (4 Templates) <table border="1"> <thead> <tr> <th>Add</th> <th>Templates</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 10 Grade 10: English 200</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 11 Grade 11: English 300</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 12 Grade 12: English 400</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 9 Grade 9: English 100</td> </tr> </tbody> </table> | Add | Templates | <input type="button" value="Add"/> | Course of Study 10 Grade 10: English 200 | <input type="button" value="Add"/> | Course of Study 11 Grade 11: English 300 | <input type="button" value="Add"/> | Course of Study 12 Grade 12: English 400 | <input type="button" value="Add"/> | Course of Study 9 Grade 9: English 100 | 1 <input type="button" value="▲"/> <input type="button" value="▼"/> | Course of Study 9 <input type="button" value="X"/> Grade 9: English 100 |
| Add | Templates | | | | | | | | | | | |
| <input type="button" value="Add"/> | Course of Study 10 Grade 10: English 200 | | | | | | | | | | | |
| <input type="button" value="Add"/> | Course of Study 11 Grade 11: English 300 | | | | | | | | | | | |
| <input type="button" value="Add"/> | Course of Study 12 Grade 12: English 400 | | | | | | | | | | | |
| <input type="button" value="Add"/> | Course of Study 9 Grade 9: English 100 | | | | | | | | | | | |
| | 2 <input type="button" value="▲"/> <input type="button" value="▼"/> | Course of Study 10 <input type="button" value="X"/> Grade 10: English 200 | | | | | | | | | | |
| | 3 <input type="button" value="▲"/> <input type="button" value="▼"/> | Course of Study 11 <input type="button" value="X"/> Grade 11: English 300 | | | | | | | | | | |
| | 4 <input type="button" value="▲"/> <input type="button" value="▼"/> | Course of Study 12 <input type="button" value="X"/> Grade 12: English 400 | | | | | | | | | | |
| + Course of Study Math (4 Templates) | | | | | | | | | | | | |

Expanded Category and Values Selected

Template Bank Categories display on the left and the selected text displays on the right. Click the **Add** button to add the template value. This adds the template to the queue of values on the right. The red **X** removes selected templates while the sequence field can be used to reorder the templates. Another option is to use the up and down arrows next to the sequence field to reorder values.

Click **Cancel** to go back to the document. The **Clear Selected Template(s)** button removes all selected template values from the right selection screen.

Once selections are finalized, click the **Insert Selected Template(s)** button to add the values to the field within the document in the selected order. Template values are separated by carriage returns.

Courses of Study:

Grade 9: English 100

Grade 10: English 200

Grade 11: English 300

Grade 12: English 400

Example Template Bank Selections in the Document

Text Editors

Images should not be inserted into text fields.

Editors

[Education Plan \(ADM-1\)](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | [Student and Parent Concerns](#) | [Student and Team Vision](#) | [Student Profile](#) | [PLAAFP: Academics](#) | [PLAAFP: Behavior/Social/Emotional](#) | [PLAAFP: Communication](#) | [PLAAFP: Additional Areas](#) | [Postsecondary Education Planning](#) | [Community and Interagency Connections](#) | [Transfer of Rights to Student](#) | [Decision-Making Options for Student](#) | [Transition to Adult Service Agency\(ies\)](#) | [Accommodations and Modifications](#) | [State/Districtwide & Alternate Assessments](#) | [Measurable Annual Goals](#) | [Schedule of Progress Reporting](#) | [Participation in General Education Setting](#) | [Consultation Services Grid A](#) | [Special Education Services](#) | [Related Services](#) | [Transportation](#) | [Schedule Modification](#) | [ESY Services](#) | [ESY Transportation Services](#) | [Additional Information](#) | [Response Section](#) | [Team Meeting](#) | [Amendment](#) | [Amendment - Additional Information](#) | [Amend Response](#)

Education Plan (ADM-1)

The Education Plan editor includes general meeting and screening information and lists the dates associated with the plan, such as dates the plan is active.

This editor must be saved before entering data into other editors.

Plan Header (ADM-1) IN PROGRESS
Editor 1 of 34

| | | |
|---|---|---|
| Meeting Type * | Specify Other | |
| <input type="text" value="Initial"/> | <input type="text"/> | |
| Date of Meeting * | Start Date * | End Date * |
| <input type="text" value="09/18/2023"/> | <input type="text" value="09/18/2023"/> | <input type="text" value="09/17/2024"/> |
| Next Scheduled Annual Review Meeting * | Next Scheduled Three-Year Reevaluation Meeting * | |
| <input type="text" value="09/17/2024"/> | <input type="text" value="09/03/2026"/> | |

Plan Header (ADM-1) Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|-------|-------------|------------|
|-------|-------------|------------|

| Field | Description | Validation |
|--|---|--|
| Meeting Type <i>Required</i> | The type of plan discussed at the meeting. Options include: <ul style="list-style-type: none"> • Initial • Annual Review • Manifestation Meeting • Placement • Reevaluation • Reconvene • Transition Plan • Other | N/A |
| Specify Other <i>*Required</i> | When applicable, the other reason for the meeting. | *This field is available and required when Other is selected as the Meeting Type. |
| Date of Meeting <i>Required</i> | The day of the meeting. | This field auto-populates with the date the plan is created. |
| Start Date <i>Required</i> | The first day of the plan. | This field auto-populates with the date the plan is created. |
| End Date <i>Required</i> | The last day of the plan. | This field auto-populates with a date one year minus one day from the entered Start Date. |
| Next Scheduled Annual Review Meeting <i>Required</i> | The day a year in the future where the plan is reviewed. | This field auto-populates with a date 365 minus one day from the Date of Meeting. |
| Next Scheduled Three-Year Reevaluation Meeting <i>Required</i> | The day three years in the future where a reevaluation must take place. | When available, this field populates from the most recent locked OR unlocked Evaluation Meeting Date plus three years minus one day. |

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Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment.

In order to Complete this editor AND lock the document, the **Refresh** button on the Enrollment Editor must be clicked then saved.

Enrollment Information (ADM-1) Editor 2 of 34

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

Primary Disability * Secondary Disability Tertiary Disability

Special Ed Level of Need * Special Ed Setting * Eval Results

School District Cycle * Specify Other Building Minutes *

Grade
KF

Assigned School Information (Complete after a placement has been made)

School Name School Phone

School Address School City School State School Zip

Cost-Shared Placement Specify Agency

Enrollment Information (ADM-1) Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|--|--|--|
| Primary Disability <i>Required</i> | The primary disability of the student. Options include: <ul style="list-style-type: none"> • 01: Intellectual • 02: Sensory/Hearing • 03: Communication • 04: Sensory/Vision • 05: Emotional • 06: Physical • 07: Health • 08: Specific Learning Disabilities • 09: Sensory/Deaf-Blind • 10: Multiple Disabilities • 11: Autism • 12: Neurological • 13: Developmental Delay | This field pulls from the Primary Disability field from the student's Enrollment record. Ad hoc Inquiries: Learner Planning > Learning Plans > disability1 |

| Field | Description | Validation |
|--|---|--|
| Secondary Disability | The second disability of the student, if applicable. Options include: <ul style="list-style-type: none"> • 01: Intellectual • 02: Sensory/Hearing • 03: Communication • 04: Sensory/Vision • 05: Emotional • 06: Physical • 07: Health • 08: Specific Learning Disabilities • 09: Sensory/Deaf-Blind • 10: Multiple Disabilities • 11: Autism • 12: Neurological • 13: Developmental Delay | This field pulls from the Secondary Disability field from the student's Enrollment record. Ad hoc Inquiries: Learner Planning > Learning Plans > disability2 |
| Tertiary Disability | The third disability of the student, if applicable. Options include: <ul style="list-style-type: none"> • 01: Intellectual • 02: Sensory/Hearing • 03: Communication • 04: Sensory/Vision • 05: Emotional • 06: Physical • 07: Health • 08: Specific Learning Disabilities • 09: Sensory/Deaf-Blind • 10: Multiple Disabilities • 11: Autism • 12: Neurological • 13: Developmental Delay | This field pulls from the Tertiary Disability field from the student's Enrollment record. Ad hoc Inquiries: Learner Planning > Learning Plans > disability3 |
| Special Ed Level of Need Required | The level at which the student requires special education services. Options include: <ul style="list-style-type: none"> • 01: Low (<2 hrs Services/week) • 02: Low (2 hrs or more/week) • 03: Moderate • 04: High | This field populates from the Special Ed Level of Need field from the student's Enrollment record. |

| Field | Description | Validation |
|---------------------------|--|---|
| Special Ed Setting | <p>The location where the student participates in the general education and/or special education program. Click the Click to expand link to view available options.</p> <p>▶ Click here to expand...</p> <ul style="list-style-type: none"> • 01: Previously enrolled in SPED, current year • 10: 6-21: Full < 21% Services Outside GE Class • 70: 6-21: Homebound/Hospital • 20: 6-21: Partial 21-60% Services Outside Class • 50: 6-21: Private Separate Day School • 90: 6-21: Public Residential Institutional Facility • 41: 6-21: Public Separate Day School • 60: 6-21: Residential School • 40: 6-21: Substantial Separation 60%<Services • 05: 3-5: GE Student Role Model in PreK Classes • 46: 3-5: Home • 42: 3-5: Private Separate Day School • 45: 3-5: Public Residential Institutional Facility • 38: 3-5: Public Separate Day School • 34: 3-5: <10 hrs EC, >50% IEP • 30: 3-5: 10+ hrs EC, <51% IEP • 31: 3-5: 10+ hrs EC, >50% IEP • 32: 3-5: <10 hrs EC, <51% IEP • 44: 3-5: Residential Facility • 48: 3-5: Service Provider Location • 36: 3-5: Substantially Separate Class | <p>This field populates from the Special Ed Setting field from the student's Enrollment record.</p> |

| Field | Description | Validation |
|---|--|--|
| Eval Results | <p>The results of the student's evaluation to determine their eligibility to receive special education services. Options include:</p> <ul style="list-style-type: none"> • 00: Not SPED Student - No Evaluation Current Year • 01: Continuing SPED - No Eval Current Year • 02: Initial Eval - Not Eligible • 03: Re-Eval - No Longer Eligible • 04: Init Eval - Eligible Instruction w/wo Services • 05: Init Eval - Eligible Related Services Only • 06: Re-Eval - Eligible Instruction w/wo Services • 07: Re-Eval - Eligible Related Services Only • 08: Init Eval in Process • 09: Evaluated and Eligible for Srvc/Parents Declined | This field pulls from the Eval Results field from the student's Enrollment record. |
| School District Cycle | <p>Options include:</p> <ul style="list-style-type: none"> • 5 day cycle • 6 day cycle • 10 day cycle • Other | N/A |
| Specify Other <i>*Required</i> | The other school district cycle. | *This field is available and required when Other is selected from School District Cycle. |
| Building Minutes <i>Required</i> | The total number of minutes of school a building has or the length of a school day or school week, depending on the calculation used. | N/A |
| Grade | The student's grade level. | This field auto-populates from the selected Enrollment record upon Refresh. |
| Assigned School Information (Complete after a placement has been made) | | |
| School Name | The name of the school associated with the student's Enrollment record. | This field auto-populates from the selected Enrollment record upon Refresh. |

| Field | Description | Validation |
|--|---|--|
| School Phone | The phone number of the school associated with the student's Enrollment record. | This field auto-populates from the selected Enrollment record upon Refresh. |
| School Address | The address of the school associated with the student's Enrollment record. | This field auto-populates from the selected Enrollment record upon Refresh. |
| Cost-Shared Placement | Indicates this school is a cost-shared location. Options are Yes or No. | N/A |
| Specify Agency <i>Required</i> | The agency associated with the placement. | This field is available and required when Yes is selected from Cost Shared Placement field. |
| District Information <i>This section is read-only.</i> | | |
| District Number | The district number associated with the Enrolled school. | This field auto-populates from the selected Enrollment record upon Refresh (District Information > State District Number). |
| District Name | The district name associated with the Enrolled school. | This field auto-populates from the selected Enrollment record upon Refresh (District Information > Name). |
| District Address | The district address associated with the Enrolled school. | This field auto-populates from the selected Enrollment record upon Refresh (District Information > Address). |
| District Phone | The district phone number associated with the Enrolled school. | This field auto-populates from the selected Enrollment record upon Refresh (District Information > Phone). Comes from Sys Admin > Resources > District |
| District SPED Address | The district special education address associated with the Enrolled school. | This field auto-populates from the selected Enrollment record upon Refresh (District Information > District SPED Address). |

| Field | Description | Validation |
|---------------------------------|---|--|
| District SPED Phone | The district special education phone associated with the Enrolled school. | This field auto-populates from the selected Enrollment record upon Refresh (District Information > District SPED Phone). |
| MA Enrollment Validation | A validation to ensure the Refresh button has been used. | In order to lock the document, the Refresh button on the Enrollment Editor must be clicked. |

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Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record from Census. See the [General Information](#) section for additional information.

This editor cannot be placed in a Not Needed status.

Student Information (ADM-1) Editor 3 of 34

When a plan is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

| | | | |
|---|-----------------------------|--|--------|
| Last Name [Redacted] | First Name ELOA | Middle Name | Suffix |
| Age 5 | Birthdate [Redacted] | Gender F | |
| Federal Designation 6: White | Federal Race(s) 6: White | Race, Ethnicity (state) 01 | |
| Student Primary Language por: Portuguese | | Language of Instruction * English | |
| Address [Redacted] BROCKTON, MA 02301 | | Home Telephone [Redacted] | |
| LASID [Redacted] | SASID [Redacted] | | |
| If 18 or older [Dropdown] | | Specify Court Appointed Guardian [Text Box] | |

Case Manager Information

Student Information (ADM-1) Editor

[▶ Click here to expand...](#)

| Field | Description | Validation |
|--------------------|----------------------------|--|
| Last Name | The student's last name. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Last Name</p> <p>identity.lastName</p> |
| First Name | The student's first name. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > First Name</p> <p>identity.firstName</p> |
| Middle Name | The student's middle name. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Middle Name</p> <p>identity.middleName</p> |
| Suffix | The student's suffix. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Suffix Name</p> <p>identity.suffix</p> |
| Age | | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> |

| Field | Description | Validation |
|--------------------------------|--|--|
| Birthdate | The student's date of birth. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Birth Date</p> <p>identity.birthDate</p> |
| Gender | The student's gender. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Gender</p> <p>identity.gender</p> |
| Federal Designation | The student's federal designated ethnicity. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Race/Ethnicity > Federal Designation</p> <p>identity.federalRaces</p> |
| Federal Race(s) | The student's race(s). | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Race/Ethnicity > Race(s)</p> <p>identity.raceEthnicity1-5</p> |
| Race, Ethnicity (state) | The student's state designated race/ethnicity. | <p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Race/Ethnicity > Race/Ethnicity</p> <p>identity.raceEthnicity</p> |

| Field | Description | Validation |
|---|---|--|
| Student Primary Language | The student's home primary language. | This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Language At Home identity.homePrimaryLanguage |
| Language of Instruction <i>Required</i> | The language the student is to receive instruction. | N/A |
| Address | The student's address. This field becomes a dropdown when more than one address exists for the student. The primary household displays by default. | Household Address Information tool address.number; address.street; address.tag; address.prefix; address.dir; address.apartment; address.city; address.state; address.zip |
| Home Telephone | The student's phone number. | This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Household Phone & Address(es) > Phone |
| LASID | The student's local ID number. | This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Student Number identity.studentNumber |
| SASID | The student's state ID number. | This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > State ID Number |

| Field | Description | Validation |
|---|--|--|
| If 18 or older | The student's decision making determination when they are 18 years old or older. Options include: <ul style="list-style-type: none"> Acting on Own Behalf Shared Decision Making Delegate Decision Making | N/A |
| Specify Court Appointed Guardian | The name of the court appointed guardian of the student. | N/A |
| Case Manager Information | | |
| Name | The name of the student's case manager. | This field auto-populates with active Case Manager Name from Team Members tool. Special Ed Team Members > Name teamMember.firstName teamMember.lastName |
| Title | The role of the student's case manager. | This field auto-populates with active Case Manager Title from Team Members tool. Special Ed Team Members > Title teamMember.title |
| Phone | The phone number of the case manager. | This field auto-populates with active Case Manager Work Phone from Team Members tool. Special Ed Team Members > Work Phone |

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Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's [Relationships](#) tool. The editor includes [Demographics](#) information for the student's guardian.

Parent/guardians are pulled in from the [Relationships](#) tool. Only parent/guardians with a

sequence number of 1 or 2 print.

The **Remove** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

This editor cannot be placed in a Not Needed status.

Parent/Guardian Information IN PROGRESS
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When a Plan is generated, a snapshot of the parent/guardian information is taken from Census. Individuals on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

*Only records with a sequence of 1 or 2 will print.

SARA LINE - MOTHER
Delete

Print Sequence

Legal Guardian

Address

BROCKTON, MA 02301

Home Phone

Work Phone

Cell Phone

E-mail

Home Primary Language

Portuguese

Parent Preferred Mode of Communication

Specify Other

RAFAEL FILIPE - FATHER
Delete

Print Sequence

Legal Guardian

Parent/Guardian Information Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|-------------------|--|---|
| Last Name | The last name of the parent/guardian. | This is part of the header for the guardian. Demographics > Last Name identity.lastName |
| First Name | The first name of the parent/guardian. | This is part of the header for the guardian. Demographics > First Name identity.firstName |

| Field | Description | Validation |
|-----------------------|--|---|
| Middle Name | The suffix of the parent/guardian. | This is part of the header for the guardian. Demographics > Middle Name identity.middleName |
| Suffix | The suffix of the parent/guardian. | This is part of the header for the guardian. Demographics > Suffix identity.suffix |
| Relationship | The relationship between the student and guardian. | This is part of the header for the guardian. Relationships > Relationships planGuardian.relationship |
| Print Sequence | The print order of the parent/guardian(s) on the IEP. | When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, parent/guardian(s) with a sequence number print in the order defined, then un-sequenced parent/guardian(s) print at the bottom. |
| Address | The address of the guardian's home. When multiple addresses exist, this field becomes a dropdown selection. | This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Households Information > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apartment; address.city; address.state; address.zip |
| Home Phone | The home phone number of the guardian. | This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Households Information > Household Phone & Address(es) > Phone contact.homePhone |

| Field | Description | Validation |
|---|--|---|
| Work Phone | The work phone number of the guardian. | <p>This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked.</p> <p>Demographics > Personal Contact Information > Work Phone</p> <p>contact.workPhone</p> |
| Cell Phone | The cell phone number of the guardian. | <p>This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked.</p> <p>Demographics > Personal Contact Information > Cell Phone</p> <p>contact.cellPhone</p> |
| Email | The email address of the guardian. | <p>This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked.</p> <p>Demographics > Personal Contact Information > Email</p> <p>contact.email</p> |
| Home Primary Language | The language spoken at the guardian's home. | <p>This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked.</p> <p>Demographics > Person Information > Home Language</p> <p>identity.homePrimaryLanguage</p> |
| Parent Preferred Mode of Communication | <p>The manner in which the parent/guardian wants to be communicated. Options include:</p> <ul style="list-style-type: none"> • Phone • Email • Messaging App • Other | N/A |

| Field | Description | Validation |
|--|------------------------------------|---|
| Specify Other <i>*Required</i> | The other manner of communication. | *This field is available and required when Other is selected as the Parent Preferred Mode of Communication field. |

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Student and Parent Concerns

The Student and Parent Concerns editor is used to document any concerns about the student's education from the student and/or parent/guardian(s). The text area for What concern(s) do you want this IEP to address? has a maximum of 6000 characters. This editor cannot be placed in a Not Needed status.

Student and Parent Concerns IN PROGRESS
Editor 5 of 34

For the purposes of special educational decision-making, "parent" shall mean father, mother, legal guardian, person acting as a parent of the child, foster parent, or educational surrogate parent appointed in accordance with federal law.

What concern(s) do you want this IEP to address?

Example concerns.

Student and Parent Concerns Editor

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Student and Team Vision

The Student and Team Vision editor is used to document the student's goals as well as their Team's goals for the student.

Student and Team Vision NOT STARTED Editor 6 of 34

Student's Vision (ages 3-13)

This year, I want to learn

By the time I finish

▼

I want to

Student's Vision/Postsecondary Goals (required for ages 14-22, may be completed earlier if appropriate)

While I am in high school, I want to

Student and Team Vision Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|---|--|
| <p>Student's Vision (ages 3-13)</p> <p>The following fields are available and required when the student's age is between 3-14 years during the plan start and end dates.</p> | | |
| <p>This year, I want to learn</p> <p><i>*Required</i></p> | <p>A text area used to describe the student's goals during the year.</p> | <p>*This field is required in order to Complete the editor.</p> <p>This field is limited to 8000 characters.</p> |
| <p>By the time I finish</p> <p><i>*Required</i></p> | <p>Indicates the school level of the student. Options are Elementary School or Middle School.</p> | <p>*This field is required in order to Complete the editor.</p> |
| <p>I want to</p> <p><i>*Required</i></p> | <p>A text area used to describe the student's goals for the student's school time.</p> | <p>*This field is required in order to Complete the editor.</p> <p>This field is limited to 8000 characters.</p> |
| <p>Student's Vision/Postsecondary Goals (required for ages 14-22, may be complete earlier if appropriate)</p> <p>The following fields are available and required when the student's age is 13 years old, but turning 14 during the plan start and end dates.</p> | | |

| Field | Description | Validation |
|---|--|---|
| While I am in high school, I want to <i>*Required</i> | A text area used to describe the student's goals for the student's high school time. | *This field is required in order to Complete the editor. This field is limited to 8000 characters. |
| After I finish high school, my education or training plans are <i>*Required</i> | A text area used to describe the student's post education education or training goals for the student. | *This field is required in order to Complete the editor. This field is limited to 8000 characters. |
| After I finish high school, my employment plans are <i>*Required</i> | A text area used to describe the student's post education employment goals for the student. | *This field is required in order to Complete the editor. This field is limited to 8000 characters. |
| After I finish high school, my independent living plans are <i>*Required</i> | A text area used to describe the student's post education independent living goals for the student. | *This field is required in order to Complete the editor. This field is limited to 8000 characters. |
| Additional Team Vision Ideas | | |
| In response to the student's vision, this year | The team's vision for the student's year based on their goals. | *This field is required in order to Complete the editor. This field is limited to 8000 characters. |
| In response to the student's vision, in 5 years | The team's vision for the student in five years based on their goals. | *This field is required in order to Complete the editor. This field is limited to 8000 characters. |

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Student Profile

The Student Profile editor is used to document the student's disability, English Learner status, and need for Assistive Technology.

This editor cannot be placed in a Not Needed status.

Selecting Autism or Sensory Impairment on this editor make certain fields on other editors required.

Student Profile IN PROGRESS
Editor 7 of 34

The student is identified as having the following disability or disabilities. Include all that apply. *

| | | |
|---|--|--|
| <input type="checkbox"/> Autism | <input type="checkbox"/> Health Impairment | <input checked="" type="checkbox"/> Sensory Impairment |
| <input type="checkbox"/> Communication Impairment | <input type="checkbox"/> Intellectual Impairment | <input checked="" type="checkbox"/> Hearing |
| <input type="checkbox"/> Developmental Delay (ages 3-9) | <input type="checkbox"/> Neurological Impairment | <input type="checkbox"/> Vision |
| <input type="checkbox"/> Emotional Impairment | <input type="checkbox"/> Physical Impairment | <input type="checkbox"/> Deaf-Blind |
| | | <input type="checkbox"/> Specific Learning Disability |

English Learner

Has the student been identified as an English Learner? *

Yes ▼

If yes, describe the student's English Learner Education Program, English as a Second Language services, and progress toward English Language proficiency benchmarks *

Example

Identify any language needs and consider how they related to the student's IEP *

Example

Student Profile Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|------------------------|-------------|------------|
| Student Profile | | |

| Field | Description | Validation |
|---|---|--|
| <p>The student is identified as having the following disability or disabilities. Include all that apply. <i>Required</i></p> | <p>The student's suspected disability. Options include:</p> <ul style="list-style-type: none"> • Autism • Communication Impairment • Developmental Delay (ages 3-9) • Emotional Impairment • Health Impairment • Intellectual Impairment • Neurological Impairment • Physical Impairment • Sensory Impairment <ul style="list-style-type: none"> ◦ Hearing ◦ Vision ◦ Deaf-Blind • Specific Learning Disability | <p>When Sensory Impairment is selected, the following fields are available and and at least one selection is required:</p> <ul style="list-style-type: none"> • Hearing • Vision • Deaf-Blind |
| English Learner | | |
| <p>Has the student been identified as an English learner? <i>Required</i></p> | <p>Indicates the student is an English Learner. Options are Yes or No.</p> | <p>N/A</p> |
| <p>If yes, describe the student's English Learner Education program, English as a Second Language services, and progress toward English language proficiency benchmarks <i>*Required</i></p> | <p>A text field used to describe the student's program, services, and progress towards English Proficiency benchmarks.</p> | <p>*This field is available and required when Yes is selected for the English Learner question.</p> <p>This field is limited to 8000 characters.</p> |
| <p>Identify any language needs and consider how they related to the student's IEP <i>*Required</i></p> | <p>A text field used to describe the student's language needs and the impacts on the student's IEP.</p> | <p>*This field is available and required when Yes is selected for the English Learner question.</p> <p>This field is limited to 8000 characters.</p> |
| Assistive Technology | | |

| Field | Description | Validation |
|--|--|---|
| Does the student require assistive technology devices or services? <i>*Required</i> | Indicates the student requires assistive technology. Options are Yes or No. | *This field is required in order to Complete the editor. |
| If yes, this will need to be addressed in the following sections of the IEP <i>*Required</i> | Indicates the section of the IEP where the assistive technology needs of the student is documented. Options include: <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Service Delivery Grid • Additional Information | *This field is available and required in order to Complete the editor when Yes is selected for the Does the student require assistive technology devices or services? question. |

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PLAAPF: Academics

The Academic Present Levels of Academic Achievement and Functional Performance editor is used to document the students academic level and needs.

Present Levels of Academic and Functional Performance: Academics Editor 8 of 34

Describe the student's present levels of academic achievement and functional performance in the relevant areas listed below.
 Consider the areas of learning listed below and complete only the sections that apply to the student. Include relevant information and data from sources such as initial or most recent evaluations; documentation from classroom performance; parent(s), student, and teacher observations; and curriculum-based and standardized assessments, including MCAS.

Briefly describe current academic performance
 Check all that apply

English Language Arts
 History and Social Sciences
 Math
 Science, Technology, and Engineering

Describe current academic performance

Strengths, interest areas and preferences

Present Levels of Academic and Functional Performance: Academics Editor

[▶ Click here to expand...](#)

| Field | Description | Validation |
|---|-------------|------------|
| Present Levels of Academic and Functional Performance: Academics | | |

| Field | Description | Validation |
|---|---|--|
| Briefly describe current academic performance. <i>*Required</i> | The area of performance. Options include: <ul style="list-style-type: none"> • English Language Arts • History and Social Sciences • Math • Science, Technology and Engineering | *This field is required in order to Complete the editor. Multiple options can be selected. |
| Describe current academic performance <i>*Required</i> | A text area used to describe the student's current academic performance. | *This field is required in order to Complete the editor. |
| Strengths, interest areas and preferences <i>*Required</i> | The student's strengths, interests, and preferences. | *This field is required in order to Complete the editor. |
| Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities <i>*Required</i> | A text area used to describe how the student's disability impacts their progress towards the general education curriculum or preschool activities. | *This field is required in order to Complete the editor. |
| Autism-Specific Question | | |
| Does the student have needs resulting from the disability that impact progress in the general curriculum, including social and emotional development <i>*Required</i> | Indicates the student has needs resulting from their disability that impacts their progress towards the curriculum. Options are Yes or No. | *This field is available and required in order to Complete the editor when Autism is selected as the Primary Disability on the Student Profile editor. |

| Field | Description | Validation |
|---|--|--|
| If yes, this need will be addressed in the following sections of the IEP <i>*Required</i> | Indicates the area of the plan where the needs are documented. Options include: <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | *This field is available and required when Autism is selected as the Primary Disability on the Student Profile editor AND Yes is selected for the previous question. |

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PLAAFP: Behavior/Social/Emotional

The Behavior/Social/Emotional Present Levels of Academic Achievement and Functional Performance editor is used to document the students behavior/social/emotional level and needs.

Present Levels of Academic Achievement and Functional Performance: Behavioral/Social/Emotional NOT STARTED Editor 9 of 34

Briefly describe current behavioral/social/emotional performance.
Consider the use of positive behavioral interventions and supports, and other strategies, to address behavior that impedes learning.

Strengths, interest areas and preferences

Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities

Bullying

Present Levels of Academic Achievement and Functional Performance: Behavioral/Social/Emotional Editor

[▶ Click here to expand...](#)

| Field | Description | Validation |
|---|---|--|
| Present Levels of Academic Achievement and Functional Performance: Behavioral/Social/Emotional | | |
| Briefly describe current behavioral/social/emotional performance <i>*Required</i> | A text area used to describe the student's current behavioral/social/emotional performance. | *This field is required in order to Complete the editor. |

| Field | Description | Validation |
|--|---|--|
| Strengths, interest areas, and preferences <i>*Required</i> | The student's strengths, interests, and preferences. | *This field is required in order to Complete the editor. |
| Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities <i>*Required</i> | A text area used to describe how the student's disability impacts their progress towards the general education curriculum or preschool activities. | *This field is required in order to Complete the editor. |
| Bullying | | |
| Describe any disability-related skills and proficiencies the student needs in order to avoid and respond to bullying, harassment, or teasing. This section must be complete for students who have a disability that affects social skills development; students vulnerable to bullying, harassment, or teasing; and students with autism. | A text area used to describe any disability-related skills and proficiencies the student needs in order to avoid and respond to bullying, harassment, or teasing. | N/A |
| Specify how these needs, if any will be addressed in the IEP. | A text area used to describe how these needs are addressed in this plan. | N/A |
| Autism-Specific Questions *This card and associated questions are available and required in order to Complete the editor when Autism is selected as the Primary Disability on the Student Profile editor. | | |
| Does the student require any positive behavioral interventions, strategies, and supports to address their behavioral difficulties resulting from autism spectrum disorder? <i>*Required</i> | Indicates the student requires positive strategies to address behavioral difficulties. Options are Yes or No. | N/A |

| Field | Description | Validation |
|---|---|--|
| Does the student need to develop social interaction skills and proficiencies? <i>*Required</i> | Indicates the student needs to develop social interaction skills. Options are Yes or No. | N/A |
| Does the student have needs related to changes in environment or to daily routines? <i>*Required</i> | Indicates the student has needs related to changes in their environment or daily routines. Options are Yes or No. | N/A |
| Does the student have needs related to repetitive activities and movements? <i>*Required</i> | Indicates the student has needs related to repetitive activities and movements. Options are Yes or No. | N/A |
| Does the student have needs resulting from their unusual responses to sensory experiences? <i>*Required</i> | Indicates the student has needs related to their responses to sensory experiences. Options are Yes or No. | N/A |
| If yes to any of the above, these needs will be addressed in the following section(s) of the IEP <i>*Required</i> | The editor in which the above needs are address in this plan. Options are: <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | *This field is available and required in order to Complete the editor when Autism is selected as the Primary Disability on the Student Profile editor AND Yes is selected from ONE or more of the questions above. |

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PLAAFP: Communication

The Communication Present Levels of Academic Achievement and Functional Performance editor is used to document the students communication level and needs.

Present Levels of Academic Achievement and Functional Performance: Communication NOT STARTED Editor 10 of 34

Briefly describe current communication performance.

Strengths, interest areas and preferences

Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities

Does the student require the use of augmentative and alternative communication (AAC)? Consider any AAC needs for non-speaking students or those with limited speech.

If yes, describe how the Team will address the student's needs (including acquiring, designing, customizing, maintaining, repairing, and/or replacing AAC device/system).

Present Levels of Academic Achievement and Functional Performance: Communication Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|--|--|
| Present Levels of Academic Achievement and Functional Performance: Communication | | |
| Briefly describe current communication performance <i>*Required</i> | A description of the student's current communication performance. | *This field is required in order to Complete the editor. |
| Strengths, interest areas, and preferences | A description of the student's strengths, interest areas, and preferences. | *This field is required in order to Complete the editor. |
| Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities | A description of the impact of the student's disability on the student's progress towards the general education curriculum/preschool activities. | *This field is required in order to Complete the editor. |

| Field | Description | Validation |
|--|--|---|
| <p>Does the student require the use of augmentative and alternative communication (AAC)? Consider any AAC needs for non-speaking students or those with limited speech.</p> | <p>Indicates the student requires the use of augmentative and alternative communication. Options are Yes or No.</p> | <p>*This field is required in order to Complete the editor.</p> |
| <p>If yes, describe how the Team will address the student's needs (including acquiring, designing, customizing, maintaining, repairing, and/or replacing AAC device/system). <i>*Required</i></p> | <p>Options include:</p> <ul style="list-style-type: none"> • The student needs an AAC device/system at school. • The student needs an AAC device/system at home or in other non-school settings to receive a free appropriate public education. • The student needs training and/or technical assistance to use the AAC device/system. • The student's family needs training and/or technical assistance concerning the AAC device/system. • Educators, other professionals, employers, or others who work with the student need training and/or technical assistance concerning the AAC device/system. | <p>*This field is available and required when Yes is selected above.</p> <p>Multiple options may be selected.</p> |
| <p>These needs will be addressed in the following section(s) of the IEP <i>*Required</i></p> | <p>The needs addressed in the IEP. Options include:</p> <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | <p>*This field is available and required when Yes is selected above.</p> |
| <p>Autism-Specific Question</p> | | |

| Field | Description | Validation |
|---|--|---|
| <p>Does the student have needs in the areas of verbal and nonverbal communication, including but not limited to those identified in assistive technology/AAC evaluation(s)? <i>*Required</i></p> | <p>Indicates the student has needs in verbal/nonverbal communication. Options are Yes or No.</p> | <p>*This field is available and required when Autism is selected as the Primary Disability on the Student Profile editor.</p> |
| <p>If yes, these needs will be addressed in the following section(s) of the IEP <i>*Required</i></p> | <p>Options include:</p> <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | <p>*This field is available and required when Autism is selected as the Primary Disability on the Student Profile editor AND Yes is selected from one of the above questions.</p> |

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PLAAFP: Additional Areas

The Additional Area Present Levels of Academic Achievement and Functional Performance editor is used to document the students additional areas level and needs.

Present Levels of Academic Achievement and Functional Performance: Additional Areas NOT STARTED Editor 11 of 34

Additional Areas, as Applicable (such as activities of daily living, health, hearing, motor, sensory, and vision)
Briefly describe current performance and any applicable documentation. Please note that parent(s) are only asked to share health information voluntarily.

Strengths, interest areas and preferences

Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities

Deaf or Hard of Hearing

Present Levels of Academic Achievement and Functional Performance: Additional Areas Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|---|--|
| Present Levels of Academic Achievement and Functional Performance: Additional Areas | | |
| Additional Areas, as Applicable (such as activities of daily living, health, hearing, motor, sensory, and vision) <i>*Required</i> | A description of the student's current performance in other areas. | *This field is required in order to Complete the editor. |
| Strengths, interest areas, and preferences <i>*Required</i> | A description of the student's strengths, interest areas, and preferences. | *This field is required in order to Complete the editor. |
| Impact of student's disability on involvement and progress in the general education curriculum or appropriate preschool activities <i>*Required</i> | A description of the impact of the student's disability on the student's progress towards the general education curriculum/preschool activities. | *This field is required in order to Complete the editor. |
| Deaf or Hard of Hearing | | |
| The student is deaf or hard of hearing | Indicates the student is deaf or hard of hearing. | *This field is available when Sensory > Hearing OR Sensory > Deaf-Blind is selected as the student's disability on the Student Profile editor. |
| Their language and communication needs will be addressed in the following section(s) of the IEP | The area of the IEP where the student's language/communication needs are addressed. Options include: <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | *This field is available and required in order to Complete the editor when The student is deaf or hard of hearing checkbox is marked. |
| Blind or Visually Impaired - including Cortical Visual Impairment | | |

| Field | Description | Validation |
|--|---|---|
| Braille is needed | Indicates the student requires the use of Braille. | *This field is available when Sensory > Vision OR Sensory > Deaf-Blind is selected as the student's disability on the Student Profile editor. |
| Braille is needs will be addressed in the following section(s) of the IEP | The area of the IEP where the student's Braille needs are addressed. Options include: <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | This field is available when the Braille checkbox is marked. |
| Screen readers or assistive technology is needed | Indicates the student requires screen readers or assistive technology. | *This field is available when Sensory > Vision OR Sensory > Deaf-Blind is selected as the student's disability on the Student Profile editor. |
| Screen readers or other assistive technology needs will be addressed in the following section(s) of the IEP | The area of the IEP where the student's assistive technology needs are addressed. Options include: <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | This field is available when the Screen reader checkbox is marked. |
| Orientation and mobility services are needed | Indicates the student requires orientation and mobility services are needed. | *This field is available when Sensory > Vision OR Sensory > Deaf-Blind is selected as the student's disability on the Student Profile editor. |

| Field | Description | Validation |
|---|--|--|
| Orientation and mobility services needs will be addressed in the following section(s) of the IEP | <p>The area of the IEP where the student's mobility services needs are addressed.</p> <p>Options include:</p> <ul style="list-style-type: none"> • Accommodations/Modifications • Goals/Objectives • Services Delivery Grid • Additional Information | <p>This field is available when the Orientation and mobility services are needed checkbox is marked.</p> |

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Postsecondary Education Planning

The Postsecondary Education Planning editor is used to describe the student's postsecondary education plans and needs.

Postsecondary Transition Planning* NOT STARTED Editor 12 of 34

Complete for eligible students aged 14-21 and update annually. Complete also for students who are 13 and will turn 14 during this IEP period.

Postsecondary Transition

Education/training ⓘ
Briefly describe current performance.

Education/training: Strengths, interest areas, and preferences

Education/training: Impact of student's disability on involvement in the general education curriculum and/or specific area of postsecondary transition.

Postsecondary Education Planning Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---------------------------------|--|---|
| Postsecondary Transition | | |
| Education/training | A description of the student current education/training performance. | This field is limited to 8000 characters. |

| Field | Description | Validation |
|---|---|---|
| Education/training: Strengths, interest areas, and preferences | A description of the student's strengths, interest areas, and preferences. | This field is limited to 8000 characters. |
| Education/training: Impact of student's disability on involvement in the general education curriculum and/or specific area of postsecondary transition. | A description of the impact of the student's disability on their involvement in the general education curriculum/postsecondary transition area. | This field is limited to 8000 characters. |
| Employment | A description of the student current employment performance. | This field is limited to 8000 characters. |
| Employment: Strengths, interest areas, and preferences | A description of the student's strengths, interest areas, and preferences. | This field is limited to 8000 characters. |
| Employment: Impact of student's disability on involvement in the general education curriculum and/or specific area of postsecondary transition. | A description of the impact of the student's disability on their involvement in the general education curriculum/postsecondary transition area. | This field is limited to 8000 characters. |
| Community experiences/postschool independent living, if applicable | A description of the student current community/experience/postschool independent living performance. | This field is limited to 8000 characters. |
| Community experiences/postschool independent living: Strengths, interest areas, and preferences | A description of the student's strengths, interest areas, and preferences. | This field is limited to 8000 characters. |
| Community experiences/postschool independent living: Impact of student's disability on involvement in the general education curriculum and/or specific area of postsecondary transition. | A description of the impact of the student's disability on their involvement in the general education curriculum/postsecondary transition area. | This field is limited to 8000 characters. |

| Field | Description | Validation |
|--|---|---|
| The identified areas of postsecondary transition will be addressed in the following section(s) of the IEP | Options include: <ul style="list-style-type: none"> Accommodations/Modifications Goals/Objectives Services Delivery Grid Additional Information | N/A |
| Projected date of graduation/program completion | The student's projected date of graduation/program completion. | N/A |
| Projected type of completion document | The type of completion document. Options include: <ul style="list-style-type: none"> Diploma Certificate of attainment Other completion document | N/A |
| Specify other completion document <i>*Required</i> | The other type of completion document. | *This field is available and required when Other is selected above. This field is limited to 150 characters. |
| Planned Course of Study <i>Side Panel</i> | | |
| School Year <i>Required</i> | The school year when the course takes place. | N/A |
| Grade <i>Required</i> | The grade in which the student takes the course. | N/A |
| Course of Study <i>Required</i> | Options include: <ul style="list-style-type: none"> Actual Courses Potential Courses | N/A |
| What requirements does the student need to meet to receive the type of completion document above? | | |
| | The requirements needed for the student to receive their completion document. | This field is limited to 8000 characters. |

| Field | Description | Validation |
|---|--|---|
| What is the student's current status regarding meeting those requirements? | The student's current status regarding meeting those requirements. | This field is limited to 8000 characters. |

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Community and Interagency Connections

The Community and Interagency Connections editor is used to document all agencies responsible for providing services for the student.

Community and Interagency Connections IN PROGRESS Editor 13 of 34

| | Agency | School Liaison | Support Provided |
|--|----------------|----------------|---------------------|
| | Example agency | Example role | Example description |

1 - 1 of 1 items

Community and Interagency Connections List Screen

[▶ Click here to expand...](#)

Community and Interagency Connections List Screen

| Column Name | Description |
|-------------------------|--|
| Padlock Icon | The user currently editing the record. |
| Agency | The agency responsible. |
| School Liaison | The person coordinating between the school and the agency. |
| Support Provided | The type of support provided. |

Community and Interagency Connections Detail Screen

Select an existing record or click **New** to view the detail screen.

Community and Interagency Connections

Agency
Include name of agency, street address, city, state and zip code

Example agency

Role and contact information of school staff who will be the liaison to the agency
Include name, phone number, agency, school and role

Example role

Description of Support Provided

Example description

Community and Interagency Connections Detail Screen

| Field | Description | Validation |
|---|--|--|
| Agency | The agency responsible. | This field is limited to 200 characters. |
| Role and contact information of school staff who will be the liaison to the agency | The person coordinating between the school and the agency. | This field is limited to 200 characters. |
| Description of Support Provided | The type of support provided. | This field is limited to 200 characters. |

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Transfer of Rights to Student

The Transfer of Rights to Student editor is used to document whether or not the student turns 17 during the timeframe of the IEP.

Transfer of Rights to Student Editor 14 of 34

IN PROGRESS

The student and parent(s) must be notified at least one year before the student's 18th birthday that decision-making rights will transfer from parent(s) to the student when the student turns 18.

Is the student 17 or will they turn 17 during the timeframe of this IEP?

On what date was the student provided with the notice of transfer of rights and a copy of procedural safeguards concerning special education rights?

On what date was the parent(s) provided with notice of transfer of rights and a copy of procedural safeguards concerning special education rights?

Transfer of Rights to Student Editor

[Click here to expand...](#)

| Field | Description |
|---|---|
| Is the student 17 or will they turn 17 during the timeframe of this IEP? | Indicates the student is 17 or will turn 17 during the timeframe of the IEP. Options are Yes or No. |
| On what date was the student provided with the notice of transfer of rights and a copy of procedural safeguards concerning special education rights? | The date the student was provided the notice of transfer of rights and a copy of the procedural safeguards documentation. |
| On what date was the parent(s) provided with notice of transfer of rights and a copy of procedural safeguards concerning special education rights? | The date the parent/guardian(s) were provided the notice of transfer of rights and a copy of the procedural safeguards documentation. |

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Decision-Making Options for Student

The Decision Making Options for Student editor is used to document the student's decision determination when the student is 18 or older.

Decision-Making Options for Student * Editor 15 of 34

IN PROGRESS

Complete for student who has turned 18. Please indicate the decision-making option that the student or court-appointed legal guardian has selected.

The student will make their own decisions.

The student will share decision-making with their parent, caregiver, or other adult. Individual with who the student will share decision-making

The student has delegated decision-making to their parent, caregiver, or other adult. Individual with whom the student has delegated decision-making

A court has appointed a legal guardian for the student who will make educational decisions. Name of court-appointed legal guardian

Date of determination

Decision-Making Options for Student Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|--|--|
| <p>Complete for student who has turned 18. Please indicate the decision-making option that the student or court-appointed legal guardian has selected.</p> | <p>Options include:</p> <ul style="list-style-type: none"> • The student will make their own decisions. • The student will share decision-making with their parent, caregiver, or other adult. • The student has delegated decision-making to their parent, caregiver, or other adult. • A court has appointed a legal guardian for the student who will make educational decisions. | <p>Only one checkbox may be selected.</p> |
| <p>Individual with who the student will share decision-making</p> | <p>The person who shares decision-making with the student.</p> | <p>*This field is available and required when The student will share decision-making is marked.</p> <p>This field is limited to 100 characters.</p> |
| <p>Individual with whom the student has delegated decision-making</p> | <p>The person delegated to make decisions for the student.</p> | <p>*This field is available and required when The student will delegate decision-making is marked.</p> <p>This field is limited to 100 characters.</p> |
| <p>Name of court-appointed legal guardian</p> | <p>The name of the court-appointed legal guardian for the student.</p> | <p>*This field is available and required when The student will delegate decision-making is marked.</p> <p>This field is limited to 100 characters.</p> |
| <p>Date of determination</p> | <p>The date the determination was made.</p> | <p>N/A</p> |

Transition to Adult Service Agency(ies)

The Transition to Adult Service Agency(ies) editor is used to document whether or not the student is within two years of exiting special education services.

Transition to Adult Service Agency or Agencies - 688 Referral Editor 16 of 34

Is the student within 2 years of exiting special education services?

If yes, has the Team discussed whether the student meets the criteria for a 688 referral?

Has a 688 referral been submitted for this student?

If so, date the 688 referral was submitted

If no, date the 688 referral will be submitted *

If yes, please identify the agency to which referral was made

Transition to Adult Service Agency(ies) Editor

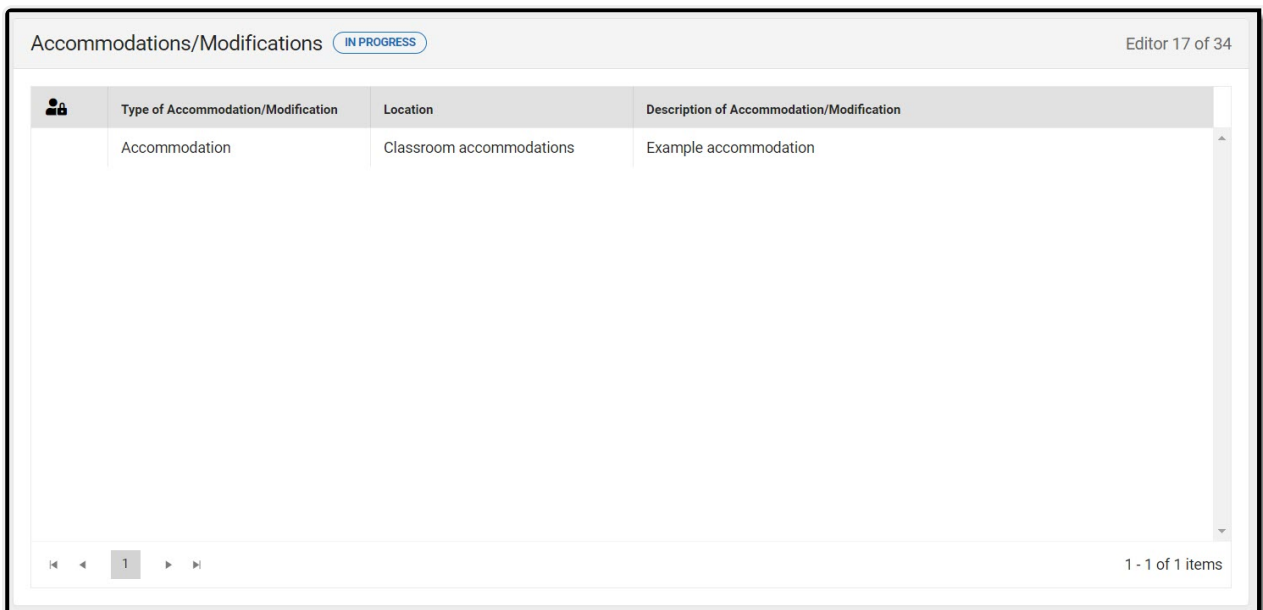
[▶ Click here to expand...](#)

| Field | Description | Validation |
|--|---|---|
| Is the student within 2 years of exiting special education services? | Indicates the student is within two years of exiting special education services. Options are Yes or No. | N/A |
| If yes, has the Team discussed whether the student meets the criteria for a 688 referral? <i>*Required</i> | Indicates the team discussed whether or not the student meets criteria for a 688 referral. Options are Yes or No. | *This field is available and required when Yes is selected above. |
| Has a 688 referral been submitted for this student? | Indicates a 688 referral has been submitted. Options are Yes or No. | N/A |
| If so, date the 688 referral was submitted | The date the 688 referral was submitted. | *This field is available and required when Yes is selected above. |
| If so, date the 688 referral will be submitted | The date the 688 referral is to be submitted. | *This field is available and required when No is selected above. |
| If yes, please identify the agency to which referral was made | The agency who received the referral. | This field is limited to 100 characters. |

Accommodations and Modifications

The Accommodations and Modifications editor is used to document any changes the student requires in order to participate in the general education curriculum.

At least one accommodation AND at least one modification are required in order to Complete the editor.



Accommodations/Modifications List Screen

[▶ Click here to expand...](#)

Accommodations and Modifications List Screen

| Column Name | Description | Validation |
|---|--|------------------------------------|
| Padlock Icon | The user currently editing the record. | N/A |
| Type of Accommodation/Modification | The type of accommodation or modification. | N/A |
| Location | The location of the accommodation or modification. | Displays the first 100 characters. |

| Column Name | Description | Validation |
|--|---|------------------------------------|
| Description of Accommodation/Modification | The description of the accommodation or modification. | Displays the first 100 characters. |

Accommodations and Modification Detail Screen

Select an existing record or click **New** to view the detail screen.

Accommodations/Modifications

Accommodations: List the accommodations the student needs to make progress in the areas of academic achievement and functional performance. Leave blank any boxes that are not appropriate for the student.

Modifications: List the modifications, if any, that are needed to the student's program so they can meet their goals, make progress, and participate in activities alongside students with and without disabilities. Leave blank any boxes that are not appropriate for the student.

Accommodation or Modification

Type of Accommodation

Location of Accommodation

Describe Accommodation(s)

Accommodations/Modifications Detail Screen

| Field | Description | Validation |
|--------------------------------------|---|--|
| Accommodation or Modification | Options are Accommodation or Modification. | N/A |
| Type of accommodation | The type of accommodation. Options include: <ul style="list-style-type: none"> • Presentation of Instruction • Response • Timing and/or Scheduling • Setting and/or Environment | This is a state-defined/hard coded list. Displays when an Accommodation is selected from the Accommodation or Modification dropdown. |
| Location of accommodation | The location of the accommodation. Options include: <ul style="list-style-type: none"> • Classroom accommodations • Nonacademic settings • Extracurricular activities • Community/workplace | This is a state-defined/hard coded list. Displays when an Accommodation is selected from the Accommodation or Modification dropdown. |

| Field | Description | Validation |
|----------------------------------|--|--|
| Describe accommodation(s) | A description of the accommodation(s). | This field is limited to 8000 characters. |
| Type of modification | The type of modification. Options include: <ul style="list-style-type: none"> • Content • Instruction • Student Output | This is a state-defined/hard coded list. Displays when an Accommodation is selected from the Accommodation or Modification dropdown. |
| Location of modification | The location of the modification. Options include: <ul style="list-style-type: none"> • Classroom modifications • Nonacademic settings • Extracurricular activities • Community/workplace | This is a state-defined/hard coded list. Displays when an Accommodation is selected from the Accommodation or Modification dropdown. |
| Describe modification(s) | A description of the modification(s). | This field is limited to 8000 characters. |

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State/Districtwide & Alternate Assessments

The State or District-Wide Assessment editor includes types of assessments and the subjects in which the student receives accommodations.

State and/or Districtwide Assessment/Alternate Assessment NOT STARTED Editor 18 of 34

Identify the state or districtwide assessments planned during the IEP period. Template

Consider MCAS (Grades 3-12), ACCESS (Grades K-12), etc.

How does the student participate in state and/or districtwide assessments?

Please indicate which testing accommodations the student requires

English Language Arts Template

Math Template

State and/or Districtwide Assessment/Alternate Assessment Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|--|--|--|
| Identify the state or districtwide assessments planned during the IEP period. | The state or districtwide assessments planned during the IEP period. | The Template Bank for this field is called Plan - Assessments. This field is limited to 8000 characters. |
| How does the student participate in state and/or districtwide assessments? | Options include: <ul style="list-style-type: none"> • The student participates in on-demand assessment with no accommodations under routine conditions in all content areas • The student participates in on-demand assessment with accommodations | N/A |
| English Language Arts | A text area used to describe the English Language Arts assessment. | The Template Bank for this field is called Plan - Assessment - ELA. This field is limited to 8000 characters. |
| Math | A text area used to describe the Math assessment. | The Template Bank for this field is called Plan - Assessment - Math. This field is limited to 8000 characters. |
| Science | A text area used to describe the Science assessment. | The Template Bank for this field is called Plan - Assessment - Science. This field is limited to 8000 characters. |
| Other | A text area used to describe the Other assessment. | The Template Bank for this field is called Plan - Assessment - Other. This field is limited to 8000 characters. |

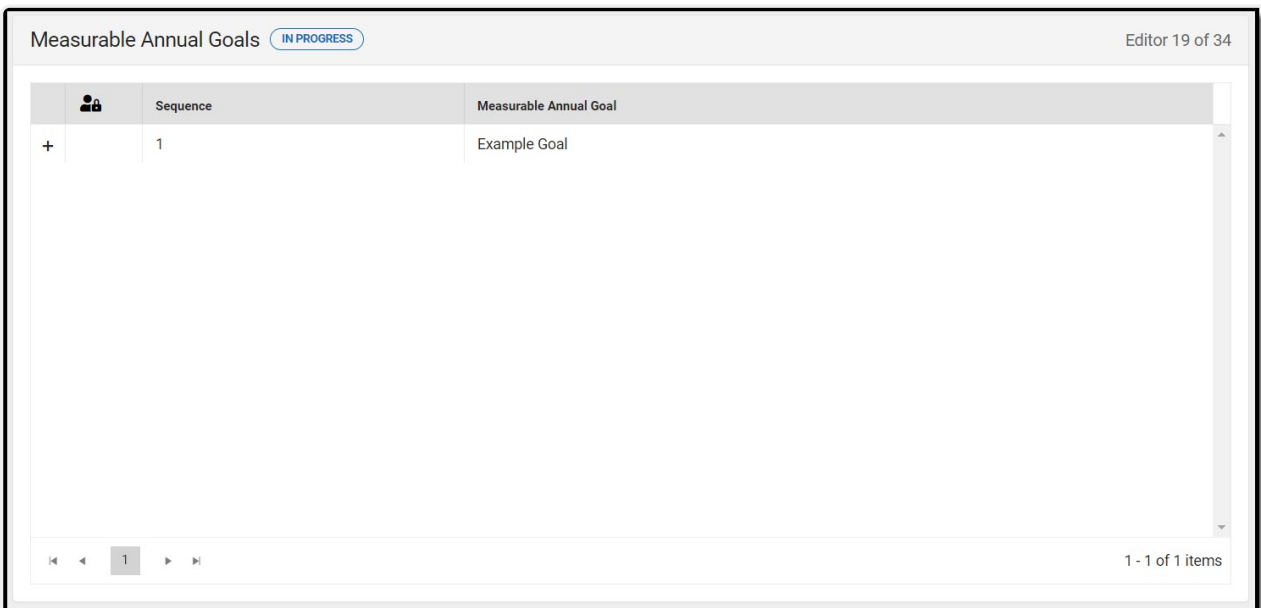
| Field | Description | Validation |
|---|---|---|
| The student participates in state and/or districtwide alternate assessment(s). | Indicates the student participates in state and/or districtwide alternate assessments. | N/A |
| Alternate assessment for English Language Arts needed | Indicates the student participates in an alternate assessment for English Language Arts. | N/A |
| Explanation for English Language Arts <i>*Required</i> | An explanation for why the student participates in an alternate assessment for English Language Arts. | *This field is available and required when "Alternate assessment for English Language Arts is needed" is selected. This field is limited to 8000 characters. |
| Alternate assessment for Math needed | Indicates the student participates in an alternate assessment for Math. | N/A |
| Explanation for Math <i>*Required</i> | An explanation for why the student participates in an alternate assessment for Math. | *This field is available and required when "Alternate assessment for Math is needed" is selected. This field is limited to 8000 characters. |
| Alternate assessment for Science needed | Indicates the student participates in an alternate assessment for Science. | N/A |
| Explanation for Alternate Science <i>*Required</i> | An explanation for why the student participates in an alternate assessment for Science. | *This field is available and required when "Alternate assessment for Science is needed" is selected. This field is limited to 8000 characters. |
| Alternate assessment for ACCESS for ELLs needed | Indicates the student participates in an alternate assessment for ACCESS for ELLs. | N/A |

| Field | Description | Validation |
|--|--|---|
| Explanation for Alternate ACCESS for ELLs <i>*Required</i> | An explanation for why the student participates in an alternate assessment for Math. | *This field is available and required when "Alternate assessment for ACCESS for ELLs is needed" is selected. This field is limited to 8000 characters. |

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Measurable Annual Goals

The Measurable Annual Goals editor lists the goals associated with the IEP, each including the student's current abilities and the goal to be reached within the scope of the IEP.



Measurable Annual Goals List Screen

[▶ Click here to expand...](#)

Measurable Annual Goals List Screen

| Column Name | Description |
|-------------------------------|--|
| Padlock Icon | The user currently editing the record. |
| Sequence | The order of the record. |
| Measurable Annual Goal | The name of the goal. |

Measurable Annual Goals Detail Screen

Select an existing record or click **New** to view the detail screen.

Measurable Annual Goals

Please identify the academic and functional goals for this student this year. The goals must be measurable and meet the student's needs that result from their disability to enable them to be involved in and make progress in Early Childhood Outcomes (ages 3-5) or the Massachusetts Curriculum Framework (older students). The goals must meet each of the student's other educational needs that result from their disability. Please include additional goals as necessary.

Sequence Number *

Goal Area *

Baseline
What can the student currently do?

Annual Goal/Target
What skill(s) will the student be expected to attain by the end of this IEP's timeframe?

Measurable Annual Goals Detail Screen

| Field | Description | Validation |
|---|---|---|
| Measurable Annual Goals | | |
| Sequence Number <i>Required</i> | The order of the record. | N/A |
| Goal Area <i>Required</i> | The goal area. | This field is limited to 100 characters. |
| Baseline | The student's current level. | This field is limited to 8000 characters. |
| Annual Goal/Target | The skill the student wishes to obtain by the end of the IEP. | This field is limited to 8000 characters. |
| Criteria | The measurement for attaining the goal. | This field is limited to 8000 characters. |
| Method | The method for measuring progress. | This field is limited to 8000 characters. |
| Schedule | The frequency of measuring progress. | This field is limited to 8000 characters. |
| Person(s) Responsible | The person responsible for progress. | This field is limited to 8000 characters. |

| Field | Description | Validation |
|---|--|---|
| Objectives | | |
| Sequence Number | The order of the record. | N/A |
| Short-term objectives and/or bookmarks | The intermediate steps between the baseline and the annual goal. | This field is limited to 8000 characters. |

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Schedule of Progress Reporting

The text field on this editor is limited to 8000 characters.

Schedule of Progress Reporting IN PROGRESS
Editor 20 of 34

Explain how and when parent(s) will be periodically informed of the student's progress toward meeting the annual goal(s)

Example explanation

Schedule of Progress Reporting Editor

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Participation in General Education Setting

The Participation in General Education Setting editor is used to document the extent to which the student participates in a general education setting.

Participation in General Education Setting IN PROGRESS
Editor 21 of 34

Can the student's educational needs be met in the general education setting, with or without the use of supplementary aids and services? *

If no, provide an explanation of the extent to which the student will not participate in general education. Include a description of the specific supplementary aids and services considered before determining that the student would be removed from a general education class or activity.

Participation in General Education Setting Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|---|---|
| <p>Can the student's educational needs be met in the general education setting, with or without the use of supplementary aids and services? <i>Required</i></p> | <p>Indicates the student's needs are met in a general education setting with or without supplementary aids and services. Options are Yes or No.</p> | <p>N/A</p> |
| <p>If no, provide an explanation of the extent to which the student <u>will not</u> participate in general education. Include a description of the specific supplementary aids and services considered before determining that the student would be removed from a general education class or activity. <i>*Required</i></p> | <p>An explanation as to the extent to which the student will not participate in a general education setting.</p> | <p>*This field is available and required when No is selected above.</p> |

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Consultation Services Grid A

The Consultation Services Grid A editor is used to document the consultation services the student requires.

Consultation Services Editor 22 of 34

| | Goal Number(s) | Type of Service ↑ | Location | Start Date | End Date |
|--|----------------|------------------------|-----------|------------|----------|
| | 1 | Consultation Service 1 | In school | 09/18/23 | 09/17/24 |

1 - 1 of 1 items

Consultation Services List Screen

▶ [Click here to expand...](#)

Consultation Services Grid A List Screen

| Column Name | Description |
|------------------------|--|
| Padlock Icon | The user currently editing the record. |
| Goal Number(s) | The number of the goal. |
| Type of Service | The type of service. |
| Location | The location of the service. |
| Start Date | The first day of service. |
| End Date | The last day of service. |

Consultation Services Grid A Detail Screen

Select an existing record or click **New** to view the detail screen.

Consultation Services

Include specially designed instruction, related services, and supports based on peer-reviewed research to the extent possible (including, if applicable, positive behavioral supports and support/training for school personnel and/or parent(s)). Consider providing services in general education settings before considering other options.

Addresses Goal(s)

Type of Service * **Service Provider ***

Location *

Duration and Frequency

Start Date * **End Date ***

Amount of Time * **Frequency *** **Per Day Cycle *** **Specify Other**

Consultation Services Detail Screen

| Consultation Services | | |
|--|---|--|
| Addresses Goals | The goal addressed by the special education services. | This field populates with the goals entered in the Measurable Annual Goals editor. |
| Type of Service <i>Required</i> | The type of service. | The values available in this dropdown are set up using the Special Ed Services tool. |
| Service Provider <i>Required</i> | The service provider of the service. | The values available in this dropdown are set up using the Special Ed Service Position tool. |
| Location <i>Required</i> | The location of the service. | N/A |
| Duration and Frequency | | |
| Start Date <i>Required</i> | The first day of the service. | This auto-populates with the Start Date entered on the Education Plan editor. |
| End Date <i>Required</i> | The last day of the service. | This auto-populates with the End Date entered on the Education Plan editor. |
| Amount of Time <i>Required</i> | The amount of time for the service. | N/A |
| Frequency <i>Required</i> | The frequency of service. | N/A |

| | | |
|--|---|---|
| Per Day Cycle <i>Required</i> | The per day cycle of the service. Options include: <ul style="list-style-type: none"> • 5 day cycle • 6 day cycle • 10 day cycle • Other | N/A |
| Specify Other <i>*Required</i> | The other per day cycle of the service. | *This field is available and required when Other is selected from the Per Day Cycle dropdown. |

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Special Education Services

The Special Education Services editor is used to document the special education services the student requires.

Services with a "General Education Classroom" Setting always print in the Table B: Special Education and Related Services in General Education Classroom section, regardless of the editor into which this service was entered.

Services with an "Other Setting" Setting always print in the Table C: Special Education and Related Services in Other Settings section, regardless of the editor into which this service was entered.

Special Education Services IN PROGRESS Editor 23 of 34

| | Goal Number(s) | Type of Service ↑ | Location | Start Date | End Date |
|--|----------------|-------------------|-----------|------------|----------|
| | 1 | Normal Service 1 | In school | 09/18/23 | 09/17/24 |

◀ 1 ▶
1 - 1 of 1 items

Special Education Services List Screen

▶ [Click here to expand...](#)

Special Education Services List Screen

| Column Name | Description |
|------------------------|--|
| Padlock Icon | The user currently editing the record. |
| Goal Number(s) | The number of the goal. |
| Type of Service | The type of service. |
| Location | The location of the service. |
| Start Date | The first day of service. |
| End Date | The last day of service. |

Special Education Services Detail Screen

Select an existing record or click **New** to view the detail screen.

Special Education Services

Include specially designed instruction, related services, and supports based on peer-reviewed research to the extent possible (including, if applicable, positive behavioral supports and support/training for school personnel and/or parent(s)). Consider providing services in general education settings before considering other options.

Addresses Goal(s)

Example area

Type of Service * **Service Provider ***

Location * **Setting ***

Duration and Frequency

Start Date * **End Date ***

Amount of Time * **Frequency *** **Per Day Cycle *** **Specify Other**

Special Education Services Detail Screen

| Field | Description | Validation |
|---|---|--|
| Special Education Services | | |
| Addresses Goals | The goal addressed by the special education services. | This field populates with the goals entered in the Measurable Annual Goals editor. |
| Type of Service <i>Required</i> | The type of service. | The values available in this dropdown are set up using the Special Ed Services tool. |

| Field | Description | Validation |
|--|---|--|
| Service Provider <i>Required</i> | The service provider of the service. | The values available in this dropdown are set up using the Special Ed Service Position tool. |
| Location <i>Required</i> | The location of the service. | N/A |
| Setting <i>Required</i> | Options are General Education Classroom or Other Settings. | N/A |
| Duration and Frequency | | |
| Start Date <i>Required</i> | The first day of the service. | This auto-populates with the Start Date entered on the Education Plan editor. |
| End Date <i>Required</i> | The last day of the service. | This auto-populates with the End Date entered on the Education Plan editor. |
| Amount of Time <i>Required</i> | The amount of time for the service. | N/A |
| Frequency <i>Required</i> | The frequency of service. | N/A |
| Per Day Cycle <i>Required</i> | The per day cycle of the service. Options include: <ul style="list-style-type: none"> • 5 day cycle • 6 day cycle • 10 day cycle • Other | N/A |
| Specify Other <i>*Required</i> | The other per day cycle of the service. | *This field is available and required when Other is selected from the Per Day Cycle dropdown. |

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Related Services

The Related Services editor is used to document the related services the student requires.

Services with a "General Education Classroom" Setting always print in the Table B: Special Education and Related Services in General Education Classroom section, regardless of the editor into which this service was entered.

Services with an "Other Setting" Setting always print in the Table C: Special Education and

Related Services in Other Settings section, regardless of the editor into which this service was entered.

| Goal Number(s) | Type of Service | Location | Start Date | End Date |
|----------------|-------------------------|-----------|------------|----------|
| 1 | Another Related Service | In school | 09/18/23 | 09/17/24 |

Related Services List Screen

▶ [Click here to expand...](#)

Related Services List Screen

| Column Name | Description |
|------------------------|--|
| Padlock Icon | The user currently editing the record. |
| Goal Number(s) | The number of the goal. |
| Type of Service | The type of service. |
| Location | The location of the service. |
| Start Date | The first day of service. |
| End Date | The last day of service. |

Related Services Detail Screen

Select an existing record or click **New** to view the detail screen.

Related Services

Include specially designed instruction, related services, and supports based on peer-reviewed research to the extent possible (including, if applicable, positive behavioral supports and support/training for school personnel and/or parent(s)). Consider providing services in general education settings before considering other options.

Addresses Goal(s)

Type of Service * **Service Provider ***

Location * **Setting ***

Duration and Frequency

Start Date * **End Date ***

Amount of Time * **Frequency *** **Per Day Cycle *** **Specify Other**

Related Services Detail Screen

| Field | Description | Validation |
|--|--|--|
| Related Services | | |
| Addresses Goals | The goal addressed by the special education services. | This field populates with the goals entered in the Measurable Annual Goals editor. |
| Type of Service <i>Required</i> | The type of service. | The values available in this dropdown are set up using the Special Ed Services tool. |
| Service Provider <i>Required</i> | The service provider of the service. | The values available in this dropdown are set up using the Special Ed Service Position tool. |
| Location <i>Required</i> | The location of the service. | N/A |
| Setting <i>Required</i> | Options are General Education Classroom or Other Settings. | N/A |
| Duration and Frequency | | |
| Start Date <i>Required</i> | The first day of the service. | This auto-populates with the Start Date entered on the Education Plan editor. |
| End Date <i>Required</i> | The last day of the service. | This auto-populates with the End Date entered on the Education Plan editor. |
| Amount of Time <i>Required</i> | The amount of time for the service. | N/A |

| Field | Description | Validation |
|--|---|---|
| Frequency <i>Required</i> | The frequency of service. | N/A |
| Per Day Cycle <i>Required</i> | The per day cycle of the service. Options include: <ul style="list-style-type: none"> • 5 day cycle • 6 day cycle • 10 day cycle • Other | N/A |
| Specify Other <i>*Required</i> | The other per day cycle of the service. | *This field is available and required when Other is selected from the Per Day Cycle dropdown. |

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Transportation

The Transportation editor is used to document the student's transportation needs.

Transportation Services Editor 25 of 34

Transportation will be provided in the same manner as it would be for students without disabilities. ?

The student requires transportation supports and/or services as a related service.

Specify type of transportation required by the student

Student will be transported on a **regular** transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions

Student will be transported on a **special** transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions

Specify the disability-related need(s) that require support(s) during transportation
(e.g., seizures, a tendency for motion sickness, behavioral or communication difficulties)

Transportation Services Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|---|---|
| Transportation will be provided in the same manner as it would be for students without disabilities. | Indicates transportation is provided for the student in the same manner as it would be for students without disabilities. | Either this or the "The student requires transportation..." checkbox can be marked. |

| Field | Description | Validation |
|---|---|---|
| The student requires transportation supports and/or services as a related service. | Indicates the student requires transportation supports and/or services. | Either this or the "Transportation will be provided in the same manner..." checkbox can be marked. |
| Specify type of transportation required by the student | Options include: <ul style="list-style-type: none"> • Student will be transported on a regular transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions • Student will be transported on a special transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions | *This field is available when "The student requires transportation supports..." is marked. Only one option can be marked. |
| Specify the disability-related need(s) that require support(s) during transportation <i>*Required</i> | A description of the student's needs that require transportation services. | *This field becomes available and required when "The student requires transportation supports..." is marked. This field is limited to 8000 characters. |

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Schedule Modification

The Schedule Modification editor is used to document any modifications needed for the student's school schedule.

Schedule Modification Editor 26 of 34

Does the student require a different duration to their school program, including the length of their day or year so that they can receive a free appropriate public education? *

If yes, what are the student's disability-related needs that require a different schedule?

If yes, describe the change in schedule to the student's educational program.

If the student requires Extended School Year Services, please include the services they will receive (including, if applicable, positive behavioral supports and support/training for school personnel and/or parent(s)) during Extended School Year in the Extended School Year Services Editor.

Schedule Modification Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|--|---|
| <p>Does the student require a different duration to their school program, including the length of their day or year so that they can receive a free appropriate public education?</p> <p><i>Required</i></p> | <p>Indicates the student requires a different duration to their school program. Options are Yes or No.</p> | <p>N/A</p> |
| <p>If yes, what are the student's disability-related needs that require a different schedule?</p> <p><i>*Required</i></p> | <p>The student's needs that require a different schedule.</p> | <p>*This field is available and required when Yes is selected from "Does the student require a different duration..."</p> |
| <p>If yes, describe the change in schedule to the student's educational program.</p> <p><i>*Required</i></p> | <p>The change in the student's schedule.</p> | <p>*This field is available and required when Yes is selected from "Does the student require a different duration..."</p> |

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ESY Services

The ESY Services editor is used to document the student's ESY Services.

ESY Services Editor 27 of 34

| | Goal Number(s) | Type of Service ↑ | Location | Start Date | End Date |
|--|----------------|------------------------|-----------|------------|----------|
| | 1 | Consultation Service 1 | In school | 09/18/23 | 09/17/24 |

1 - 1 of 1 items

ESY Services List Screen

▶ [Click here to expand...](#)

ESY Services List Screen

| Column Name | Description |
|------------------------|--|
| Padlock Icon | The user currently editing the record. |
| Goal Number(s) | The number of the goal. |
| Type of Service | The type of service. |
| Location | The location of the service. |
| Start Date | The first day of service. |
| End Date | The last day of service. |

ESY Services Detail Screen

Select an existing record or click **New** to view the detail screen.

ESY Services

Describe the specially designed instruction, related services, and supports that the student needs during extended school year to receive a free appropriate public education.

Service *

Addresses Goal(s)

Type of Service * **Service Provider ***

Location * **Setting**

Duration and Frequency

Start Date * **End Date ***

Amount of Time * Frequency * Per Day Cycle * Specify Other

ESY Services Detail Screen

| Field | Description | Validation |
|--|---|--|
| Consultation Services | | |
| Service <i>Required</i> | Options are: <ul style="list-style-type: none"> • Consultation • Special Education Service • Related Service | N/A |
| Addresses Goals | The goal addressed by the special education services. | This field populates with the goals entered in the Measurable Annual Goals editor. |
| Type of Service <i>Required</i> | The type of service. | The values available in this dropdown are set up using the Special Ed Services tool. |
| Service Provider <i>Required</i> | The service provider of the service. | The values available in this dropdown are set up using the Special Ed Service Position tool. |
| Location <i>Required</i> | The location of the service. | N/A |
| Setting <i>Required</i> | Options are General Education Classroom or Other Settings. | N/A |
| Duration and Frequency | | |
| Start Date <i>Required</i> | The first day of the service. | This auto-populates with the Start Date entered on the Education Plan editor. |

| Field | Description | Validation |
|--|---|---|
| End Date <i>Required</i> | The last day of the service. | This auto-populates with the End Date entered on the Education Plan editor. |
| Amount of Time <i>Required</i> | The amount of time for the service. | N/A |
| Frequency <i>Required</i> | The frequency of service. | N/A |
| Per Day Cycle <i>Required</i> | The per day cycle of the service. Options include: <ul style="list-style-type: none"> • 5 day cycle • 6 day cycle • 10 day cycle • Other | N/A |
| Specify Other <i>*Required</i> | The other per day cycle of the service. | *This field is available and required when Other is selected from the Per Day Cycle dropdown. |

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ESY Transportation Services

The ESY Transportation editor is used to document the student's ESY Transportation services.

Extended School Year Transportation Services Editor 28 of 34

NOT STARTED

Transportation will be provided in the same manner as it would be for students without disabilities. ?

The student requires transportation supports and/or services as a related service.

Specify type of transportation required by the student

Student will be transported on a **regular** transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions

Student will be transported on a **special** transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions

Specify the disability-related need(s) that require support(s) during transportation
(e.g., seizures, a tendency for motion sickness, behavioral or communication difficulties)

ESY Transportation Services Editor

[▶ Click here to expand...](#)

| Field | Description | Validation |
|---|---|---|
| Transportation will be provided in the same manner as it would be for students without disabilities. | Indicates transportation is provided for the student in the same manner as it would be for students without disabilities. | Either this or the "The student requires transportation..." checkbox can be marked. |
| The student requires transportation supports and/or services as a related service. | Indicates the student requires transportation supports and/or services. | Either this or the "Transportation will be provided in the same manner..." checkbox can be marked. |
| Specify type of transportation required by the student | Options include: <ul style="list-style-type: none"> • Student will be transported on a regular transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions • Student will be transported on a special transportation vehicle with the following assistance, attendants, modifications, and/or specialized equipment and precautions | *This field is available when "The student requires transportation supports..." is marked. Only one option can be marked. |
| Specify the disability-related need(s) that require support(s) during transportation <i>*Required</i> | A description of the student's needs that require transportation services. | *This field becomes available and required when "The student requires transportation supports..." is marked. This field is limited to 8000 characters. |

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Additional Information

The Additional Information editor is used to document any other information about the student. The text field available on this editor is limited to 8000 characters.

Additional Information Editor 29 of 34

Record other IEP information not previously stated
(e.g., information about the student that is important to know but is not addressed through IEP goals and services)

Example

Additional Information Editor

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Response Section

The Response Section editor is used to document the approval or rejection of the planned IEP.

Response Section Editor 30 of 34

School Assurance: I certify that the goals in this IEP are those recommended by the Team and that the indicated special education services will be provided.

Name and Role of LEA representative **Date**

Response from parent(s) or student who has reached the age of majority with decision making rights:
It is important to tell the district your decision as soon as possible. Please indicate your response by checking the appropriate box below and returning a signed copy to the district.

I accept this IEP as developed.

I reject the following portions of the IEP with the understanding that any portion(s) that I do not reject will be considered accepted and implemented immediately.

Rejected portions are as follows:

I reject this IEP as developed.

Parent Comment: I would like to make the following comment(s) but realize any comments made that suggest changes to the proposed IEP will not be implemented unless the IEP is amended.

Response Section Editor

[▶ Click here to expand...](#)

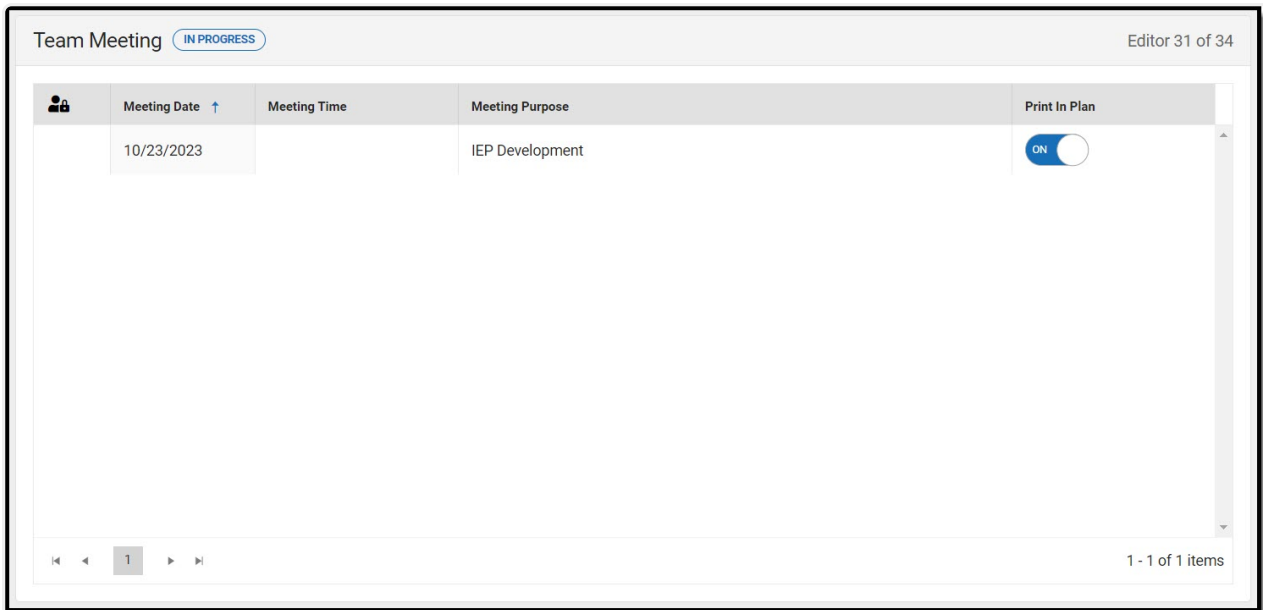
| Field | Description | Validation |
|--|---|--|
| Name and Role of LEA representative | The person and role designated as the LEA representative. | N/A |
| Date | The decision date. | N/A |
| I accept this IEP as developed. | Indicates the person accepts the IEP. | Only one of the three accept or reject checkboxes can be selected. |

| Field | Description | Validation |
|--|--|--|
| I reject the following portions of the IEP with the understanding that any portion(s) that I do not reject will be considered accepted and implemented immediately. | Indicates the person rejects a portion of the IEP. | Only one of the three accept or reject checkboxes can be selected. |
| Rejected portions are as follows: <i>*Required</i> | The rejected portions of the IEP. | *This field is available and required when "I reject the following portions..." is marked. |
| I reject this IEP as developed. | Indicates the person rejects the entire IEP. | Only one of the three accept or reject checkboxes can be selected. |
| Parent Comment: I would like to make the following comment(s) but realize any comments made that suggest changes to the proposed IEP will not be implemented unless the IEP is amended. | The parent's comment regarding changes to the IEP. | This field is limited to 8000 characters. |
| I request a meeting to discuss the rejected IEP or rejected portion(s). | Indicates a meeting is requested to discuss the rejected IEP or portions of the IEP. | N/A |

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Team Meeting

The Team Meeting editor is used to document the gathering of the IEP team.



Team Meeting List Screen

[Click here to expand...](#)

Team Meeting List Screen

| Column Name | Description |
|------------------------|---|
| Padlock Icon | The user currently editing the record. |
| Meeting Date | The day of the meeting. |
| Meeting Time | The time of the meeting. |
| Meeting Purpose | The purpose of the meeting. |
| Print in Plan | Indicates this record prints in the plan. |

Team Meeting Detail Screen

Select an existing record or click **New** to view the detail screen.

Team Meeting: 10/23/2023

Print in Plan

Meeting Date * Meeting Time Meeting Location

Invite Date

Purpose of Meeting *

Eligibility Determination/Eligibility Reevaluation

IEP Development

Placement

Transition

Other

Specify Other

Comments

Team Meeting Detail Screen

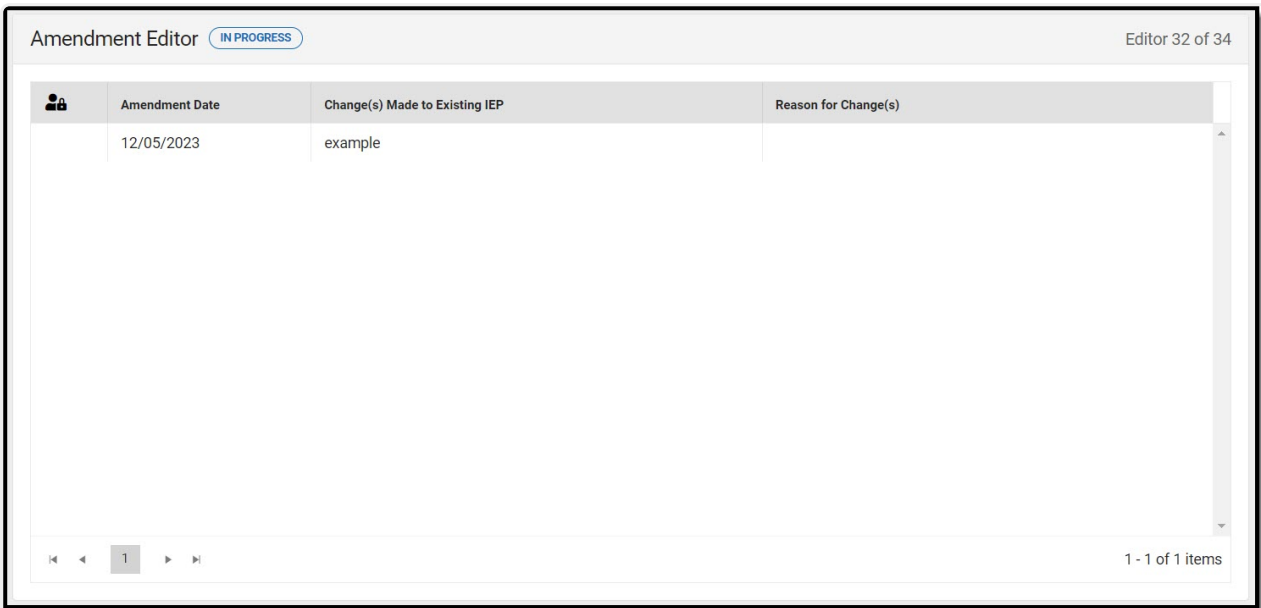
| Field | Description | Validation |
|--|---|---|
| Team Meeting: <Date> | | |
| Print in Plan | Indicates this record prints in the plan. | This defaults to marked. |
| Meeting Date <i>Required</i> | The day of the meeting. | N/A |
| Meeting Time | The time of the meeting. | N/A |
| Meeting Location | The location of the meeting. | N/A |
| Invite Date | The date the invitation to the meeting was sent. | N/A |
| Purpose of Meeting | The purpose of the meeting. Options include: <ul style="list-style-type: none"> • Eligibility Determination/Eligibility Reevaluation • IEP Development • Placement • Transition • Other | N/A |
| Specify Other <i>*Required</i> | The other purpose of the meeting. | *This field is available and required when Other is selected from Purpose of Meeting. |

| Field | Description | Validation |
|--------------------------------------|--|--|
| Comments | Any comments related to the meeting. | This field is limited to 8000 characters. |
| Attendance | | |
| First Name <i>Required</i> | The person's first name. | This field is read-only when the name pulls in from the Team Members tool when the Refresh button is clicked. Displays as a text field when the user manually enters the Team Member using the Add button. |
| Last Name <i>Required</i> | The person's last name. | This field is read-only when the name pulls in from the Team Members tool when the Refresh button is clicked. Displays as a text field when the user manually enters the Team Member using the Add button. |
| Role Name | The person's role. | N/A |
| Invited | Indicates the person has been invited. | When Invited is marked, the team member displays on the printed document. |
| Attended | Indicates the person attended the meeting. | N/A |

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Amendment

The Amendment editor is used to document changes made to the IEP.



Amendment List Screen

▶ [Click here to expand...](#)

Amendment List Screen

| Column Name | Description | Validation |
|---------------------------------------|---------------------------------------|--|
| Padlock Icon | Shows if anyone is editing the record | N/A |
| Amendment Date | The day of the amendment. | N/A |
| Change(s) Made to Existing IEP | The changes made to the IEP. | Displays the first 100 characters of entered text. |
| Reason for Change(s) | The reason for the change. | Displays the first 100 characters of entered text. |

Amendment Detail Screen

Select an existing record or click **New** to view the detail screen.

Amendment

Amendment Date *

What change(s) will be made to the existing IEP?

Why?

Amendment Detail Screen

| Field | Description | Validation |
|--|------------------------------|---|
| Amendment Date <i>Required</i> | The day of the amendment. | This field is required. |
| What change(s) will be made to the existing IEP | The changes made to the IEP. | This field is limited to 8000 characters. |
| Why? | The reason for the change. | This field is limited to 8000 characters. |

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Amendment - Additional Information

The Amendment - Additional Information editor is used to document any additional information regarding the change(s) to the IEP. The field available on the editor is limited to 8000 characters.

Amendment - Additional Information IN PROGRESS Editor 33 of 34

Record other Amendment information not previously stated
(e.g., information about the student that is important to know but is not addressed through IEP goals and services)

Amendment Additional Information Editor

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Amend Response

The Amend Response editor is used to document the acceptance or rejection of the amendment.

Amend Response NOT STARTED
Editor 34 of 34

School Assurance: I certify that the changes in this amendment are those recommended by the Team and that the indicated special education services will be provided.

Name and Role of LEA representative

Date

Response from parent(s) or student who has reached the age of majority with decision making rights:
 It is important to tell the district your decision as soon as possible. Please indicate your response by checking the appropriate box below and returning a signed copy to the district.

I accept the IEP amendment

I reject the following portions of the IEP amendment with the understanding that any portion(s) that I do not reject will be considered accepted and implemented immediately.

Rejected portions are as follows:

I reject the IEP amendment

Parent Comment: I would like to make the following comment(s) but realize any comments made that suggest changes to the proposed IEP will not be implemented unless the IEP or IEP amendment is changed.

Amend Response Editor

▶ [Click here to expand...](#)

| Field | Description | Validation |
|---|--|---|
| Name and Role of LEA representative | The LEA representative's name and role. | N/A |
| Date | The day of the amendment response. | N/A |
| <p>Response from parent(s) or student who has reached the age of majority with decision making rights: It is important to tell the district your decision as soon as possible. Please indicate your response by checking the appropriate box below and returning a signed copy to the district.</p> | | |
| I accept the IEP amendment | Indicates the person accepts the IEP amendment. | Only one of the three checkboxes indicated accept/reject can be selected. |
| I reject the following portions of the IEP amendment with the understanding that any portion(s) that I do not reject will be considered accepted and implemented immediately. | Indicates the person reject a portion the IEP amendment. | Only one of the three checkboxes indicated accept/reject can be selected. |

| Field | Description | Validation |
|---|--|--|
| Rejected portions are as follows <i>*Required</i> | The rejected portions of the IEP. | *This field is available and required when "I reject the following portions..." is selected. |
| I reject the IEP amendment | Indicates the person rejects the entire the IEP amendment. | Only one of the three checkboxes indicated accept/reject can be selected. |
| Parent Comment: I would like to make the following comment(s) but realize any comments made that suggest changes to the proposed IEP will not be implemented unless the IEP or IEP amendment is changed. | Any parent/guardian comments regarding the changes to the IEP. | This field is limited to 8000 characters. |
| I request a meeting to discuss the rejected IEP amendment or rejected portion(s). | Indicates the parent/guardian requests a meeting to discuss the rejected portion or the entire rejected IEP. | N/A |

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