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PHASE	SCREENS	FORMS
Management	(PHASE I) IEP Management Referral Details Participants IEP Meeting IEP Documents	Form Name IEP. Sect A-B: Meeting and Student Information - Pg.1 IEP. Sect. R: Names and Signatures - Pg.11
Assessment, Evaluation & PLP	(PHASE II) Assessment IEP Documents	Associated Forms Form Name IEP. Sect C-D: Language Acquisition, Goal Achievement - Pg.2 IEP. Sect E: Present Level of Performance - Pg.3
Eligibility	(PHASE III) IEP Documents	Associated Forms Form Name IEP. Sect. F: Eligibility - Pg.4 (NEW) Specific Learning Disabilities Certification New Behavior Support Plan (Page 1) New Behavior Support Plan (Page 2) New Behavior Support Plan (Page 3) Emotional Disturbance Certification Form SLI Certification Form (NEW)
Goals	(PHASE IV) IEP Documents	Associated Forms Form Name IEP. Sect. G: Annual Goals and Objectives - Pg.5 (NEW) Individual Transition Plan (NEW - Includes Page 1 - 3)
Testing and Graduation	(PHASE V) Section K IEP Documents	Associated Forms Form Name IEP Section K (Template)
Placements and Supports	(PHASE VI) IEP Documents	Associated Forms Form Name LRE Analysis FAPE Part 1 - Eligibility, Placements and Supports New Expulsion Page
Services	(PHASE VII) Services IEP Documents	Associated Forms Form Name FAPE Part 2 - Summary of Services FAPE Summary Grid LAS Certification Form (NEW)
Safeguards, Followup & Signature	(PHASE VIII) IEP Documents	Associated Forms Form Name IEP. Sect. N: Procedural Safeguards and Follow-up Actions - Pg.9 (NEW) IEP. Sect. Q: Consent for Special Education - Pg.10 Data/Transportation Transfer Form (NEW)

AMENDMENT

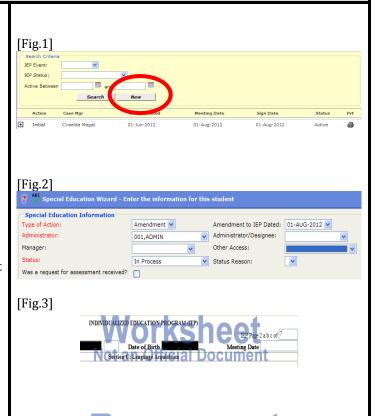
Once active, an IEP cannot be unlocked. If there are additions or changes required on the active IEP an amendment is created. Below are the requirements and procedures in creating an amendment.

- An amended IEP cannot be used for a change in placement or eligibility.
- Once active the amendment IEP is a stand-alone IEP document and will be the active IEP.
- When an Amendment IEP is created, the document pages from the IEP being amended will automatically load except pages 1 and 10 (required documents).
- An IEP must be active and current and less than a year old
- Pages that are added or modified from an Amendment IEP will print with the watermark indicating the type of changes [Fig. 3]. These documents that display Document Added or Modified can be given to the parent. Do not accept a signed IEP with the watermark "Worksheet Not an Official Document". A copy of the IEP with this watermark can be given to the parent for review but only if requested.
- An Amendment IEP cannot be changed to any other IEP Type, for example, changing from an *Amendment* to a *Review-Annual*.

Create an amendment:

- 1. Click on the *IEP Event Listing* under *Record Navigator*
- 2. Click **NEW** [Fig.1]
- 3. Populate appropriate fields [Fig.2]
 - a. Select **Amendment** as the **Type of Action**
 - b. Select the IEP date
 - c. Enter management names as appropriate
 - d. Save, OK, OK
- 4. Continue with the required pages/screens:
 - a. Page 1 (Section A&B)
 - b. Page 10 (Section Q)
 - c. Page 11 (Section R)
 - d. IEP Meeting Screen
 - e. Participants' Page
- 5. Other pages as needed

CAUTION: When creating an amendment please be aware of the IEP you are amending. Verify the IEP is ACTIVE before creating the amendment; otherwise, the amendment will amend the previous IEP. If the IEP is in PENDING status, enter the parent signature date to make it ACTIVE before creating the amendment. Amendments amend the current ACTIVE IEP.

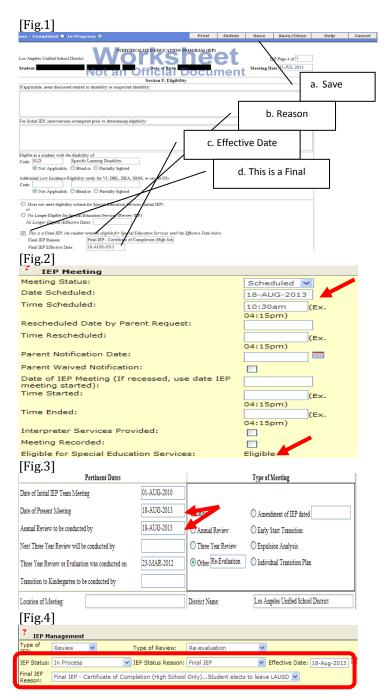


VIDUALIZED EDUCATION PROGRAM (I

FINAL

A Final IEP is selected only for a student graduating from high school or reaches the age of 22 during a school year. <u>A final IEP is not to be held until 150 days from the last day of the school year or the last day of ESY if the student is eligible</u>.

- Final IEP cannot be changed or removed in the IEP Management screen > IEP Status Reason field.
- CREATE: Review (whichever IEP is due); choose Administrator if different from default, Save, OK, OK
- 2. Go to *Eligibility Phase II* and complete *Section F: Eligibility Page 4 (NEW)* [Fig.1]
 - a. Save Page 4 immediately
 - b. Select the *Final IEP Reason*
 - c. Enter the *Effective Date*
 - d. Check off This is a Final IEP...
 - e. Click OK to the next three messages (this step will load all pages from your previous IEP except pages 1,9,10 and 11)
 - f. Select *Save/Close* (returns to the phases [flow chart])
- **3.** Go to *Management Phase I*, click *IEP Meeting* [Fig.2]
 - a. Enter the Date/Time Scheduled
 - b. *Eligible for Special Education Services* will automatically be updated with *Eligible* once page 4 has been completed.
 - c. Save
- **4.** Select *IEP Documents* and create needed documents then follow steps below for page 1 [Fig.3]:
 - a. Select Section A-B: Meeting and Student Information Page 1
 - b. Change the field Review Annual to be conducted by to the same date as the Date of Present Meeting
 - c. Save/Close
- 5. Select *IEP Management* [Fig.4]
 - a. Status should display *In Process*
 - b. IEP Status Reason should display: Final IEP
 - c. *Final IEP Reason* should match the reason on page 4
 - d. *Effective Date* should match the date on page 4
 - e. *Save*

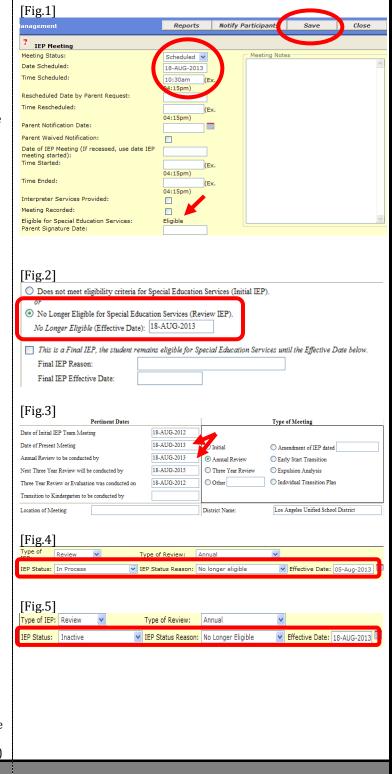


The Welligent system will change the *Active* status to *Inactive* on or soon after the *Effective Date* is reached.

NO LONGER ELIGIBLE

If a student has been found to no longer require special education services the "No Longer Eligible" option is used. The IEP is always a Review.

- 1. CREATE: Review; choose an *Administrator* if different from default, *Save*, *OK*, *OK*
- 2. Go to *Management Phase I*, click *IEP Meeting* [Fig.1]
 - Enter the **Date/Time Scheduled**
 - Eligible for Special Education Services
 will be automatically populated from page
 4.
 - **Not Eligible** appears if the effective date is current based on the system date.
 - *Eligible* appears if the effective date is in the future based on the system date.
 - Select Save
 - Select *Close*
- Go to Eligibility Phase II IEP Documents and complete Section F: Eligibility - Page 4 (NEW) [Fig.2]
 - Select **No Longer Eligible...** radio button
 - Enter the **No Longer Effective Date**
 - Complete form as needed, Save
 - Select *Close*
- 4. Go to *Management Phase I*, click *IEP Documents* [Fig.3]
 - Select Section A-B: Meeting and Student Information - Page 1
 - Keep the date of the Annual Review to be conducted by the same as the Date of Present Meeting.
 - Complete rest of form.
- 5. Select *IEP Management* [Fig.4]
 - Status should display *In Process*
 - IEP Status Reason should display: No Longer Eligible
 - *Effective Date* should match the date on page 4
 - Save
- 6. Once the IEP has been locked status will display as follows:
 - Inactive and Reason will be displayed as No Longer Eligible if the effective date is current. [Fig.5]
 - Active and Reason will be displayed as
 No Longer Eligible if the effective date is in the
 future. (Welligent will change the Active status
 to Inactive after the Effective Date is reached.)



TRANSITION

Transition is when a student matriculates from one grade to another and in the process changes school location and/or change of placement. A transition is completed on FAPE Part 1 and if any Services are changing it is noted on the SERVICES page.

- 1. Create **NEW** Review **(Whichever IEP is due)**
- 2. Open *In Process* Review
- 3. Go to Management-Phase I > IEP Meeting
 - a. Enter the *Date/Time Scheduled*
 - b. Make sure the *Eligible* button is selected
 - c. Select Save
 - d. Select *Close* (return to Phases [Flow Chart])
- Go to Eligibility Phase II > IEP Documents and complete Section F: Eligibility - Page 4 (NEW). Complete as needed.
- Go to Goals Phase IV > IEP Documents and complete Section G: Annual Goals Page 5 (NEW). Complete as needed.
- 6. Go to *Placements and Supports- Phase VI > IEP Documents* complete *FAPE Part 1* [Fig.1]
- 7. Enter data as required under the column *Future Changes Related to this IEP* for transitions

Note: The *As to Date field* should reflect the start date for future changes.

- 8. Go to *Services- Phase VII > Services* [Fig.2]
 - a. If an existing service is displayed click the black/white service# to edit that particular service, otherwise, click ADD to create a new service.
- 9. Continue creating/populated all pages and screens to complete the IEP as needed.

SAMPLE ONLY



[Fig.2]		
*Service:	Language/Speech v	
*Start Date:	Effective on Signature Date	13-AUG-2013 🔤
End Date:	18-JUN-2013	
*Service Applies To:	Regular	Regular
*Frequency:	1 🔻	1
*Interval:	Weekly 🕶	Weekly 💌
*Minutes/Interval:	30	60
*Minutes/Interval Pullout from Gen Ed):	30	60
*Service Delivery Model:	Direct Service (By a Single Provider)	Direct Service (By a Single Provider)
*Area:	School-Based 💌	
*Responsible Personnel:	Resource Specialist Teacher	Resource Specialist Teacher
Responsible Personnel:	V	V

- **Effective With This IEP** column: In a transition of services, the **End Date** changes from the IEP anniversary date to the date when the services cease.
- **Future Changes Related To This IEP** column: lists the future transition service. The **Start Date** will be the beginning of the service while the **End Date** (an optional field) will be the IEP anniversary.

PARENT REVOKES CONSENT

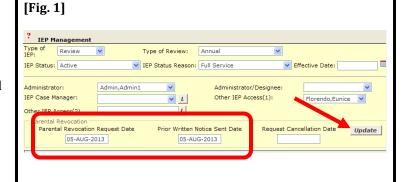
Revoking consent involves the parent submitting a written request, signed and dated, requesting to stop all special education services for their child.

Do not convene a new IEP Meeting, instead follow the instructions below.

- 1. Open Active IEP
- 2. Go to Management Phase I, select IEP Management
- 3. Enter the date the written request was received in the field called *Parent Revocation Request Date* [Fig.1]
- 4. Click the *Update* button
- 5. Scan and upload the written consent to the *Attached Documents* in the *IEP Management* screen [Fig.2]
- 6. Provide prior written notice, within (5) days informing the parent about the impact of the request. The form is called *Prior Written Notice Regarding Request to Revoke Consent for the Continued Provision of Special Education and Related Services*. Copy the document to the school's letterhead and have the administrator sign the first page.

Note: The date this form is completed and sent to the parent begins the fifteen (15) day timeline when all special education and related services will cease.

- 7. Send the completed two pages and a copy of *A Parent's Guide to Special Education Services (including Procedural Rights and Safeguards)* to the parent.
- 8. Enter the date of this form next to the field called **Prior Written Notice Sent Date** on the **IEP Management** screen [Fig.1]
- 9. Click the *Update* button.

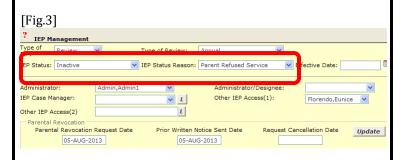




For more details refer to Bulletin 4680-0 Dated July 1, 2009

PARENT REVOKES CONSENT – CONT'D

10. Sixteen (16) days after the date of the *Parent Written Notice Sent Date* form was sent the Welligent system will change the *IEP Status* to *INACTIVE* and the *IEP Status Reason* to *PARENT REVOKED CONSENT* [Fig.3]



11. If, within the fifteen (15) day time period, the parent decides to rescind their request for revocation of special education services, the school site administrator/designee must immediately enter the date in the Welligent IEP Management Screen in the field called *Request Cancellation Date*. This stops the automatic inactivation of the student's IEP. The IEP Status will remain as *ACTIVE* and the *IEP Status Reason* will remain as *FULL SERVICES* [Fig.4]

Note: DO NOT use the *Request Cancellation Date* field for any other purpose. This field remains blank except when a parent rescinds the request to revoke consent.





There are two stages of locking an IEP.

STAGE ONE: The field called *Date of IEP Meeting* on the IEP Meeting screen will lock () your documents from being modified with the exception of the Goals (Pg. 5), the Consent Page (Pg. 10) and Management screens. As soon as the IEP meeting is over, enter the meeting date in the *Date of IEP Meeting* field along with the time and your IEP will automatically be in a *Pending* status allowing you to print the IEP for the parent/guardian to sign. The parent should receive a *clean* copy.

STAGE TWO: The field called *Parent Signature Date* is entered on the IEP Meeting screen. This will then lock page 10 and the Management screens. Prior to entering this date the parent/guardian's consent and concerns should be saved to page 10 and any necessary meeting notes should be entered on the IEP Meeting screen. Once the parent signature date is entered the *eligible* IEP will automatically become *Active*.



Remember, the IEP does not appear on reports nor will it update your timelines or LAUSD Student Information System until the *Parent Signature Date* is entered and the IEP is *Active*. It is very important for Managers to monitor their *Pending IEPs* on their *My IEP Summary* screen and get parent signatures.

PREPARATION TO LOCK AN IEP Screen Example Make sure the Meeting Status is set to Scheduled Meeting Status: 1 Scheduled **IEP Meeting** and click Save. It must be in Scheduled mode to fix any errors. Click the Yellow Triangle located under IEP This formset contains errors that will prevent this IEP from being made active. Click the icon on the left to view these Documents. errors or click here to generate a printable version of the errors. Complete any missing forms that are required This formset contains the following errors IEP Documents/ Missing forms that are required for this IEP: - IEP, Sect. E: Present Level of Performance - Pg.3 - IEP, Sect. E: Present Level of Performance - Pg.3 - IEP, Sect. E: Occorent for Special Education - Pg. 10 - IEP, Sect. Occorent for Special Education - Pg. 10 - IEP, Sect. Q: Consent for Special Education - Pg. 10 - IEP, Sect. Q: Consent for Special Education - Pg. 10 - Forms with errors that must be corrected: - IEP, Sect. A-B: Meeting and Student Information - Pg. 1 - Forms not meeting conditional requirements: - You must complete at least one of the three notification lines at the bottom of the Notification to Participate in an IEP Me (English or Spenish) letter. 2 Yellow Triangle Complete any forms not meeting conditional requirements Correct forms with errors OK Pages with a "red yes" have errors and must be cleared before the IEP can be locked. Go to each # FIEP. Sect A-B: Meeting and Student Information - Available In Jennifer Progress Cook 09-Aug-2013 Jenni Phase and clear all red yes's. SAMPLE IFP Documents Open the document with error, click "SAVE" to view the error description. SAMPLE #2 Participant Name | Status | Confirmed | Attended | From Mark ALL Participants who attended and leave the **Participants** time blank. SAMPLE SAMPLE Active ~ Assessment Request Assessment Areas Parent Consent Timelines If the IEP has If the Assessment Plan has been consented to, the Assessments New Assessment(s) SAMPLE #3 Assessment Areas must be created and assigned Assessment Category Assessment Areas Assessor Date Assigned Date Complete Initial IEP Health and Rachel Assessment Development, Including Vision and - Select the to assessors. Verify that the Status column shows Assessment Hearing General Ability,Motor Abilities,SocialEmotional Status Initial IEP Assessment "Completed" for all assessments. 09-Aug-2013 Areas Tab ☐ Initial IEP 09-Δug-2013 Completed Notifications, Messages and Attachments Management On the Meeting Notification indicate the parent's SAMPLE Total Description Screen response on the "For Office Use Only" section. Notifications/Referrals 3 Notifications and Referrals made for this individual

	LOCKING - CONT'D							
	While the Meeting Status is Marked as COMPLETED							
		Screen	Instruction	Example				
	3	IEP Meeting	Change the Meeting Status to 'Completed.'	Meeting Status: Completed				
	4	IEP Meeting 1 st Stage of Locking	Enter Date of IEP Meeting Must match the Date Scheduled, even if reconvened), Time Started, Time Ended, and Save. The time will then populate the Participants screen and remove the "Worksheet" watermark from the documents so it can be printed for parent/guardian to sign.	Date of IEP Meeting (If recessed, use date IEP meeting started): Time Started: (Ex. 04:15pm) Time Ended: (Ex. 04:15pm)				
	5	IEP Meeting	After parent signs. Update page 10 with parent's consent and comments.	IEP. Sect. Q: Consent for Special Education - Pg.10 Available Completed				
	6	IEP Meeting 2 nd Stage of Locking	Enter Parent Signature Date and Save.	Parent Signature Date:				