**Case Manager’s Aide:**

**Sample IEP Meeting Agenda:**

**Time scheduled for today’s meeting\*: \_\_\_\_\_\_\_**

1. Introduce IEP Team participants

2. State the of Purpose for the Conference

3. Ask if parents have questions about *Procedural Safeguards, Rights and Responsibilities*

4. Present Levels of Academic Achievement and Functional Performance

5. Determination of Special Factors

6. Determine Post-School Goals and Transition Needs

7. Develop Annual Goals

8. Determine Accommodations and Modifications Needed

9. Determine Service Delivery

10. Determine Placement in the Least Restrictive Environment

Distribute copies of IEP documents

 **\*If more time is needed, another meeting may be scheduled**

**Forms required for Initial Eligibility:**

* Prior Notice & Consent for Evaluation
* Procedural Safeguards
* Notice of Meeting
* Cover page
* Evaluation Report
* Appropriate Determination of Eligibility Form(s)
* Prior Notice & Initial Provision of Special Education and Related Services (if determined eligible)
* IEP (if determined eligible)
* Permission to Invite Agencies Related to Transition (if student is 15 or older)

**Forms required for Reevaluation**

* Prior Notice & Consent for Evaluation
* Notice of Meeting
* Permission to Invite Agencies Related to Transition (if student is 15 or older)
* Cover page
* Evaluation Report
* Appropriate Determination of Eligibility Form(s)
* IEP (if determined eligible), Prior Written Notice

**Forms required for Annual IEP Review**

* Notice of meeting
* Permission to Invite Agencies Related to Transition (if student is 15 or older)
* IEP (Prior Written Notice)

**Forms required for IEP Amendment without a meeting**

* IEP Amendment (Prior Written Notice)

Forms required for Special Request Meeting/IEP Amendment with a meeting

* Prior Notice & Consent for Special Evaluation (if a special evaluation was requested)
* Notice of Meeting
* Permission to Invite Agencies Related to Transition (if student is 15 or older)
* Cover page
* Evaluation Report
* Appropriate Determination of Eligibility Form(s)
* IEP (if determined eligible), Prior Written Notice

SLV BOCES Case Management guide components are listed below:

* **Definition of Case Management**- Case management is a designated person who has primary responsibility for the IEP process for the student including organizing and chairing IEP team meetings, providing notice to parents and team members, and maintaining documentation for IEP progress reports. The case manager leads a process that assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet a students needs. It is characterized by advocacy, communication, and resource management and promotes quality interventions, educational supports and student outcomes. Case managers in the San Luis Valley are our special education teachers.