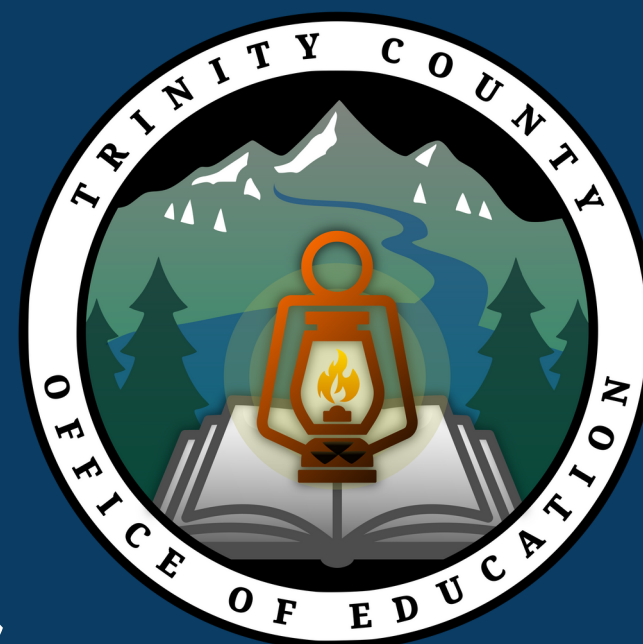


Trinity County SELPA/Trinity  
County Office of Education



# IEP Toolkit

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# for Teachers

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Tips for Running a Successful Meeting



# What You'll Find

This document will focus on providing direction on the following items/areas:

- Tips for getting started (how to set the meeting up, who to contact, etc.).
- Tips for getting your meeting coordinated (think about where the meeting is held, agendas, meeting norms, etc.).
- How to affirm and attest the IEP once it has been agreed upon.
- What to do with the completed IEP document once it has been agreed upon (i.e., where to send the original, copies, etc.)



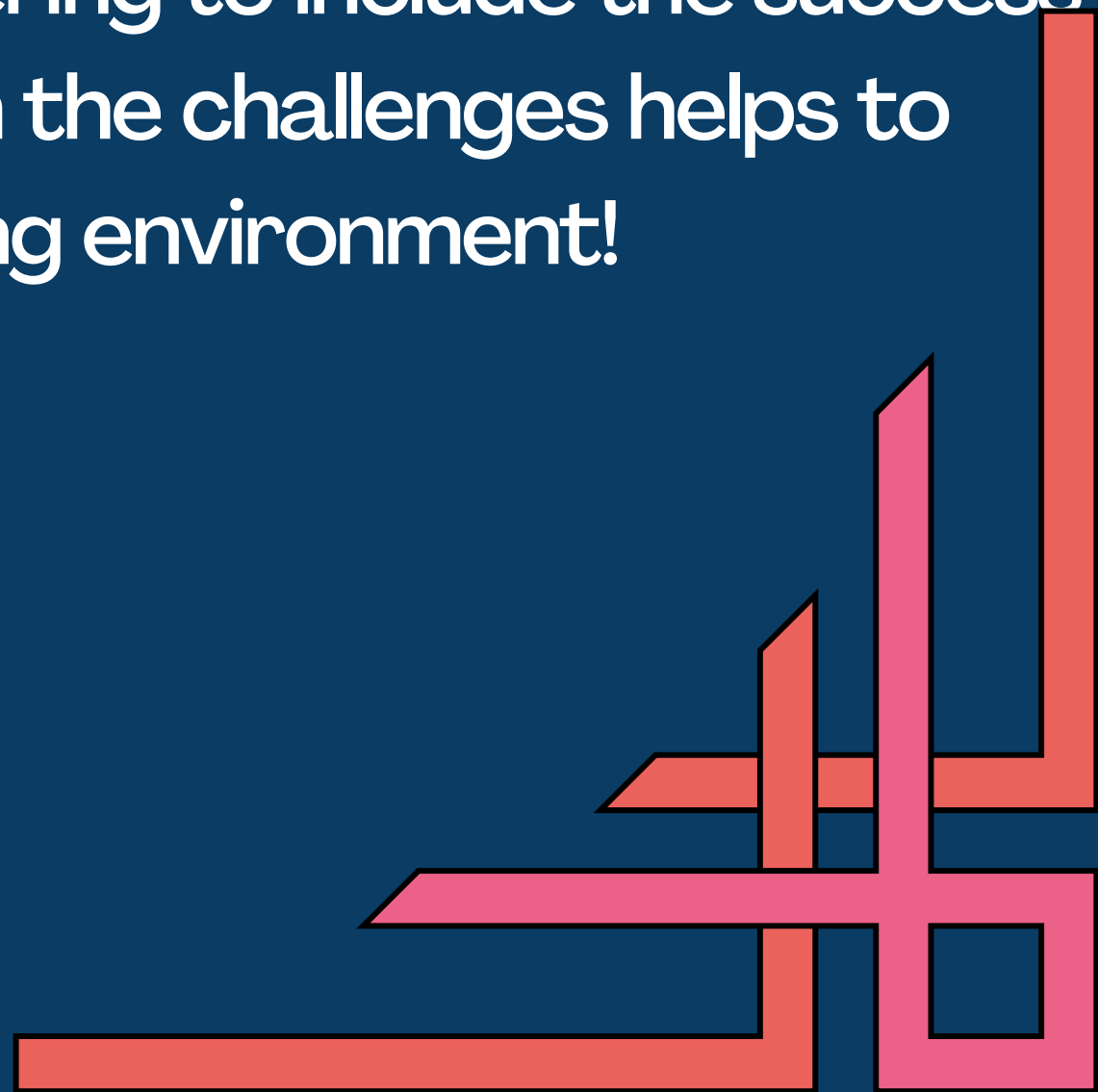
# Getting Started

## Establish an IEP Date

- Coordinate with the IEP Team on a date, time, and location that works for everyone. Each school district will have its own procedure around who sets the meeting up; typically this falls to the case manager.
- Once the meeting date, time, location, and attendees have been confirmed, inform the SELPA office to generate and mail IEP meeting notices.

## The Pre-Meeting Process

- Connect with parent(s)/guardian(s) and teacher(s) to identify any strengths, challenges, or concerns.
- By identifying any concerns prior to the meeting, we can investigate further and (hopefully) have a solution by the time the meeting takes place.
- Identifying strengths is a great way to have positive feedback to provide to the team.
  - Parent(s)/guardian(s) are frequently reminded that their children are different; remembering to include the success (no matter how small) along with the challenges helps to provide for a positive IEP meeting environment!



# Tips for a Comfortable Meeting Space

## Consider the Following:

- **Is the meeting space big enough/appropriate?**
  - Does it make sense to have a large amount of people in a small meeting space?
  - Does everyone have the same size chairs? Will it be comfortable or be perceived to have teacher in regular chairs and parent(s)/guardians(s) in small chairs?
- **How long will the meeting be?**
  - Is a long meeting productive or do people get fatigued and start to make poor choices? Does that fatigue make for positive environments?
- **Think about people's comfort**
  - Having water or snacks is always a plus, especially for a long meeting.
  - Do you have draft IEP's available? What about pens or notepads for team members to jot down notes?
- **Think about seating arrangements**
  - People in conflict should never sit across from one another; they will only zone in on the conflict.
  - Empower parent(s)/guardian(s) to introduce themselves first so they don't feel like they are 'just a parent.' Set the precedent that every member of the IEP team is equal.



# Getting Started

## Develop an Agenda

- Agendas help to keep the meeting focused and on track.
- Following the pre-meeting process and identifying strengths, challenges, etc. you can identify areas that need to be addressed during the meeting.
  - Does every page of the meeting need to be reviewed or are there specific sections to focus on?
- Agendas also ensure that we are using everyone's time efficiently, recognizing the concerns of the team, and that we are prepared and engaged.
- **Think About:** How do you feel when you walk into a meeting where you don't know the agenda, how long it will last, or what you will be discussing?

## Identify Meeting Norms

- Meeting norms help to establish a safe space for productive conversation. It is important to establish norms as a way to make sure voices and perspectives are heard and that we can engage in dialogue.
  - Meeting norms help to keep the conversation positive.
  - Meeting norms help to prevent angry feelings and frayed nerves.
  - Not every meeting requires meeting norms – look at the purpose of the meeting, the team members involved, and the historical relationships at the table.
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# Meeting Agenda Sample

[Student Name]  
[Date]  
[Time Frame; 3:45–4:45]  
Agenda

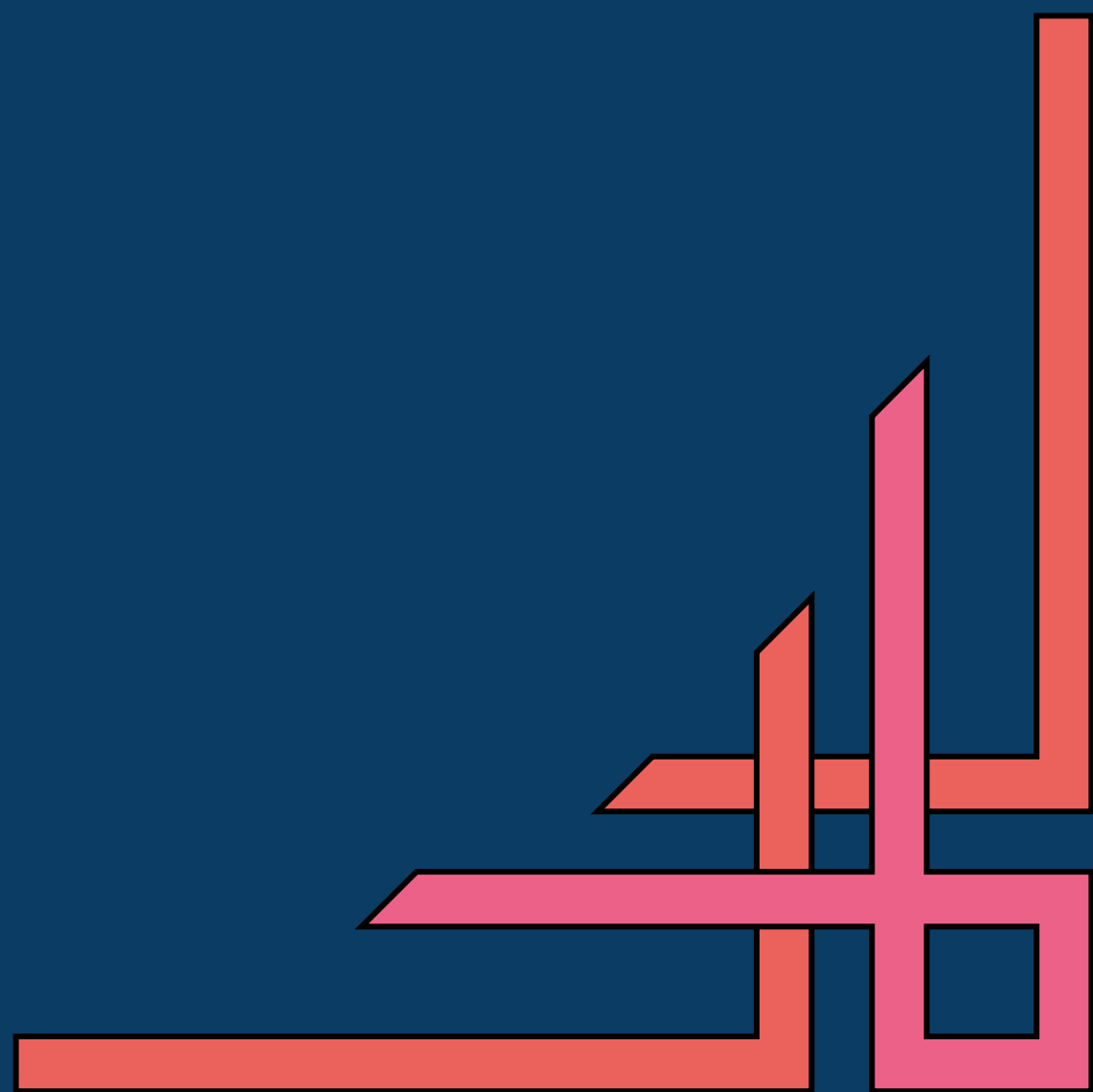
- Welcome and Introductions
- Meeting Norms
  - If necessary – Sometimes norms are only necessary if the meeting is going to be contentious or the team tends to get off track easy
- Purpose of the Meeting
  - Initial, triennial, 30 day, annual, etc.
  - Assessment Review (on initials and tri's)
- IEP Review
  - You can plug in specific info here if you want or just leave it as 'IEP Review'
  - Transition
  - Special Factors
  - Present Levels
  - Goals
  - Offer of FAPE
  - Notes Review
- Signatures and Adjournment



A black outline of a bell with three curved lines above it representing sound waves.

# During the Meeting – Reminders

- Make sure that you input all data onto the SEIS pages that you have handwritten at the actual IEP meeting before you affirm/attest.
- This is especially important on the Present Levels page where there is a lot of information that is discussed at the meeting and not pre-inputted on the form.
- Remember that the information entered in the Present Levels pages of the IEP help to establish the needs in the later sections of the IEP (i.e., goals, services, placement).
- **REMINDER:** Make sure you affirm/attest within 7 days
  - This means any and all after holding an IEP meeting. IEP meetings. (i.e. initials, annuals, triennials, interim, transition, pre-expulsion, expanded, and any other type of IEP meeting).

A hand-drawn graphic in pink and yellow. It features the word 'REMINDER' in a stylized, pink, handwritten font. Above the word is a yellow heart, and a yellow curved arrow points from the heart down to the word. To the left of the word are three short yellow lines radiating outwards, suggesting a lightbulb or a reminder.

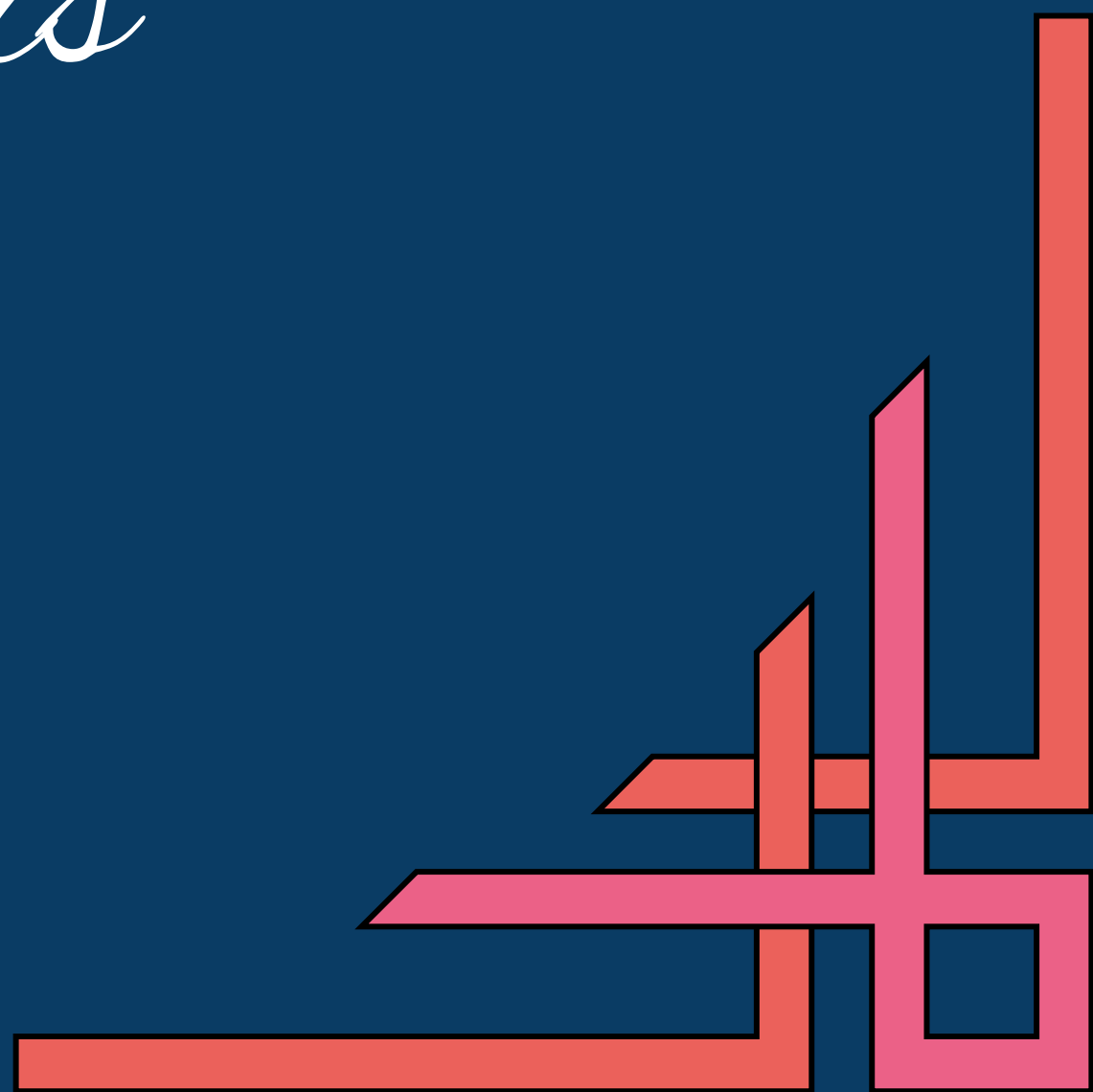
# Meeting Norms Sample

DON'T FORGET

## Meeting Norms

- Listen when others are speaking.
- Be considerate and wait your turn.
- Do not raise your voice when speaking; conversation is healthy; arguments are not.
- Keep your comments on topic and to the point; comments that are not on the agenda to can be addressed in the parking lot.
- Be curious about the perspectives and opinions of others.
- Respectful disagreement is okay!

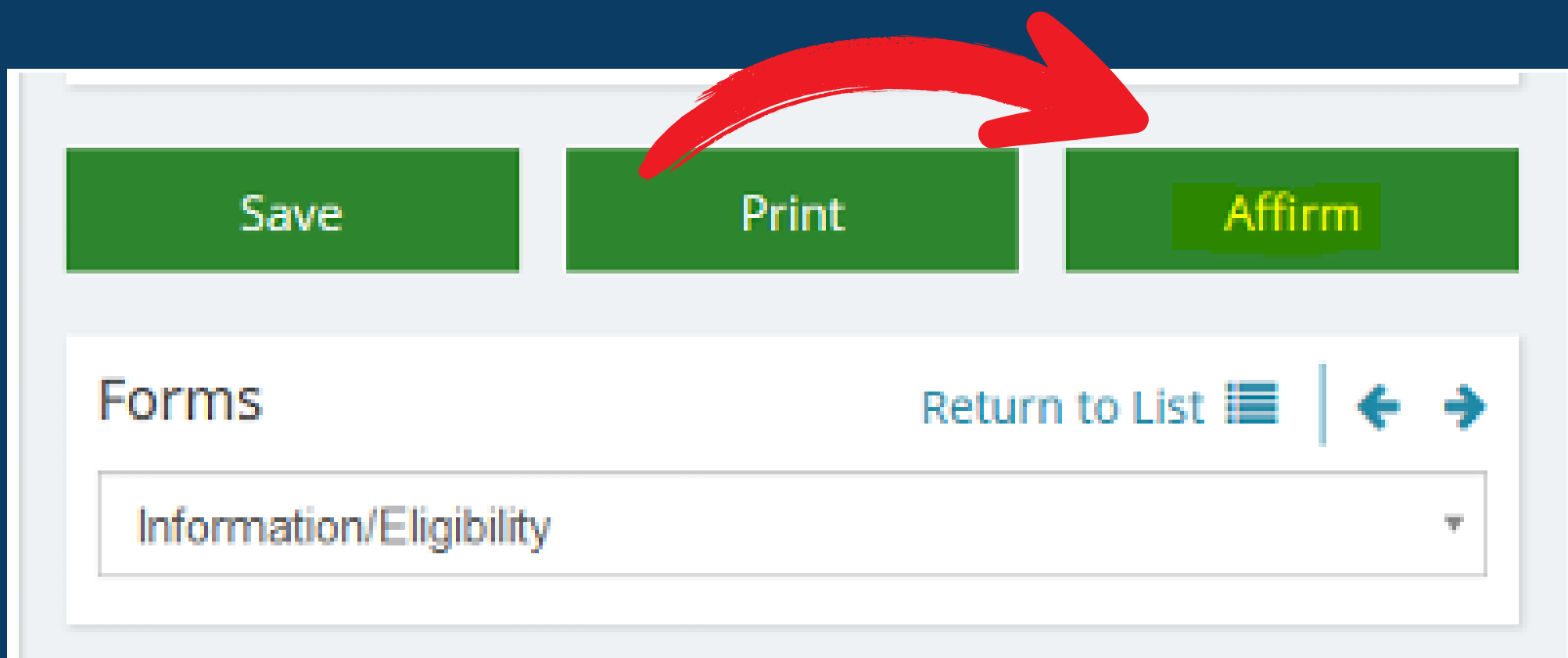
*"Can we all Agree to have  
Manners"*



# Affirming and Attesting

## What Happens when the IEP is done?

- Once the IEP has been held, it should be affirmed as soon as possible.
- Affirming does not mean that the IEP was signed in agreement (there is an option for 'Affirm without Signature').
- Affirming locks in place what happened at the meeting and should be reported to CALPADS.
- Only the case manager will see the affirm button for eligible students.
- To start the affirm process, click the 'Affirm' button.



# Affirming and Attesting

## Step 1: Verify Meeting Information

- Check each field acknowledging that the meeting date, meeting type, and plan type are correct.
- If the parent did not sign in agreement, select '**No.**'  
This will place the student into the Unsigned IEP section of the homepage.
- Once a signature is obtained, the signature field can be updated.
- Acknowledge that the Next and Last meeting dates are correct so that homepage meeting alerts are populated at the time the next meetings are due.
- If Eligibility Evaluation **ONLY** is selected as the meeting type, a validation will run to verify if any of the IEP plan fields were updated.
  - If so, the user will not be able to complete the affirm until plan review is also selected as the meeting type.
- Once the IEP has been affirmed, the meeting date and meeting type cannot be updated.

Step 1 of 3: Verify Meeting Information

Meeting Information:

Verify the Meeting Date, Meeting Type and Plan Type are correct. If correct, check the box next to each field to acknowledge the information is correct.  
**If an Eligibility Evaluation only meeting was held but IEP plan information was updated, including services, Plan Review must be selected as well.**

Once the Meeting has been affirmed, the Meeting Date and/or Meeting Type cannot be updated.  
If this information is incorrect, click the Return to Future IEP button to make the correction(s).

|                                                  |                                     |
|--------------------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> Meeting Date | May 04, 2022                        |
| <input checked="" type="checkbox"/> Meeting Type | Plan Review, Eligibility Evaluation |
| <input checked="" type="checkbox"/> Plan Type    | IFSP                                |

Parent / Legal Guardian / Adult Student Signature In Agreement ☒ Yes ☐ No

Affirm Remarks  
Affirm Remarks will display on the Current IEP

Other Meeting Dates

Please check the box next to each field to acknowledge that the Proposed Next Annual Plan Review and Next Eligibility Evaluation dates are correct as well as the Last Eligibility Evaluation Date. If these dates are incorrect, click the Return to Future IEP button to update the dates.

|                                                                               |            |
|-------------------------------------------------------------------------------|------------|
| <input checked="" type="checkbox"/> Proposed Next Annual Plan Review Date     | 05/03/2023 |
| <input checked="" type="checkbox"/> Last Eligibility Evaluation Date          | 05/04/2022 |
| <input checked="" type="checkbox"/> Proposed Next Eligibility Evaluation Date | 05/03/2026 |

[Return to Future IEP](#) [Cancel Affirm](#) [Continue Affirm](#)

# Affirming and Attesting

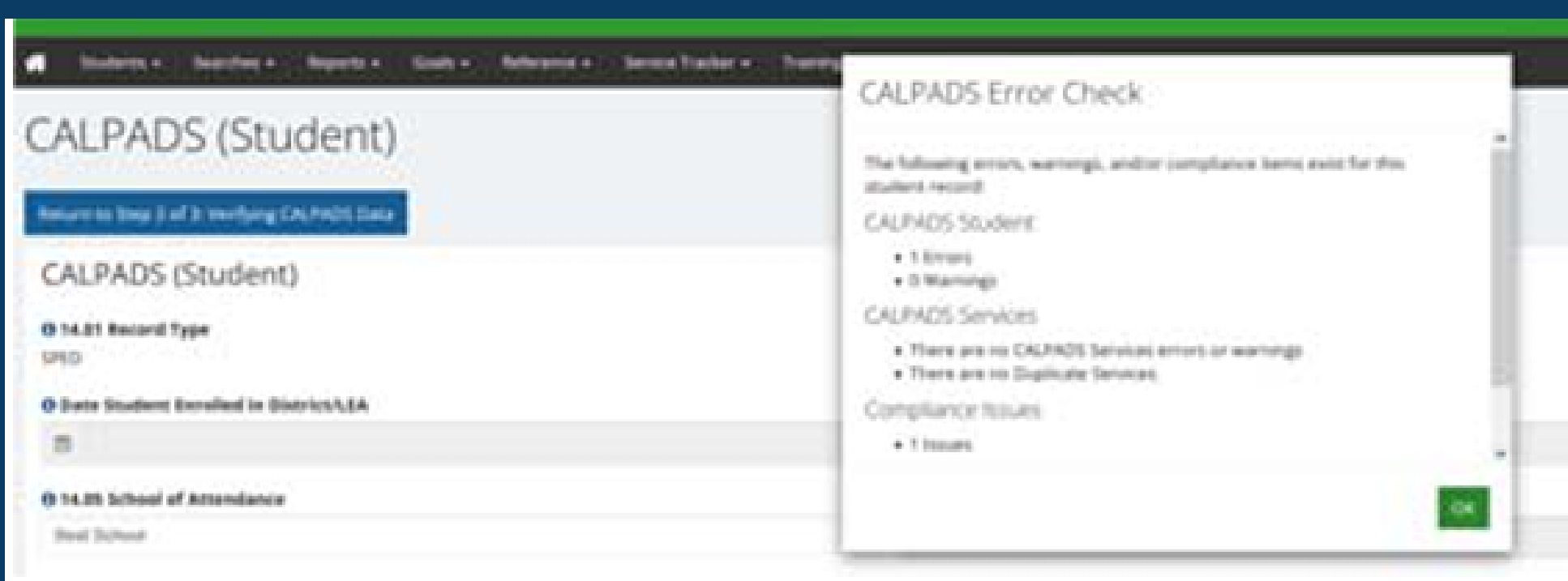
## Next Steps: Correction of CALPADS Errors

- If the IEP/student record is error free, you will be able to continue with the affirm process



## Next Steps: What if there is an Error?

- If an error exists, you will be directed to the student record to view and correct the errors.
  - Click the error check button.
  - The fields in error will display in red.
  - Once all errors have been corrected, at the top of the page click the button for return



# Affirming and Attesting

## Step 3: the Affirm/Attest Process

- Check the box next to each form that was used in this meeting.
- Only the selected forms will display in bold on the student's current IEP and can be included in an Electronic Signature.
- All forms will be included in the affirm, the bold forms will indicate which forms were included in the meeting

☐ Check/Uncheck All

Step 4 of 4: Selection of Forms Used for This Meeting

|                          |                                     |
|--------------------------|-------------------------------------|
| <input type="checkbox"/> | IEP At a Glance                     |
| <input type="checkbox"/> | Information/Eligibility             |
| <input type="checkbox"/> | Services - Offer of FAPE            |
| <input type="checkbox"/> | Educational Setting - Offer of FAPE |
| <input type="checkbox"/> | Statewide Assessments               |
| <input type="checkbox"/> | Present Levels                      |

|                          |                                                   |
|--------------------------|---------------------------------------------------|
| <input type="checkbox"/> | Assessment Plan w/out PWN w/ Medi-Cal             |
| <input type="checkbox"/> | PWN of Proposed Action Grad from HS               |
| <input type="checkbox"/> | PWN of Proposed Action Completion of Course Study |

Preview PDF Submit Cancel

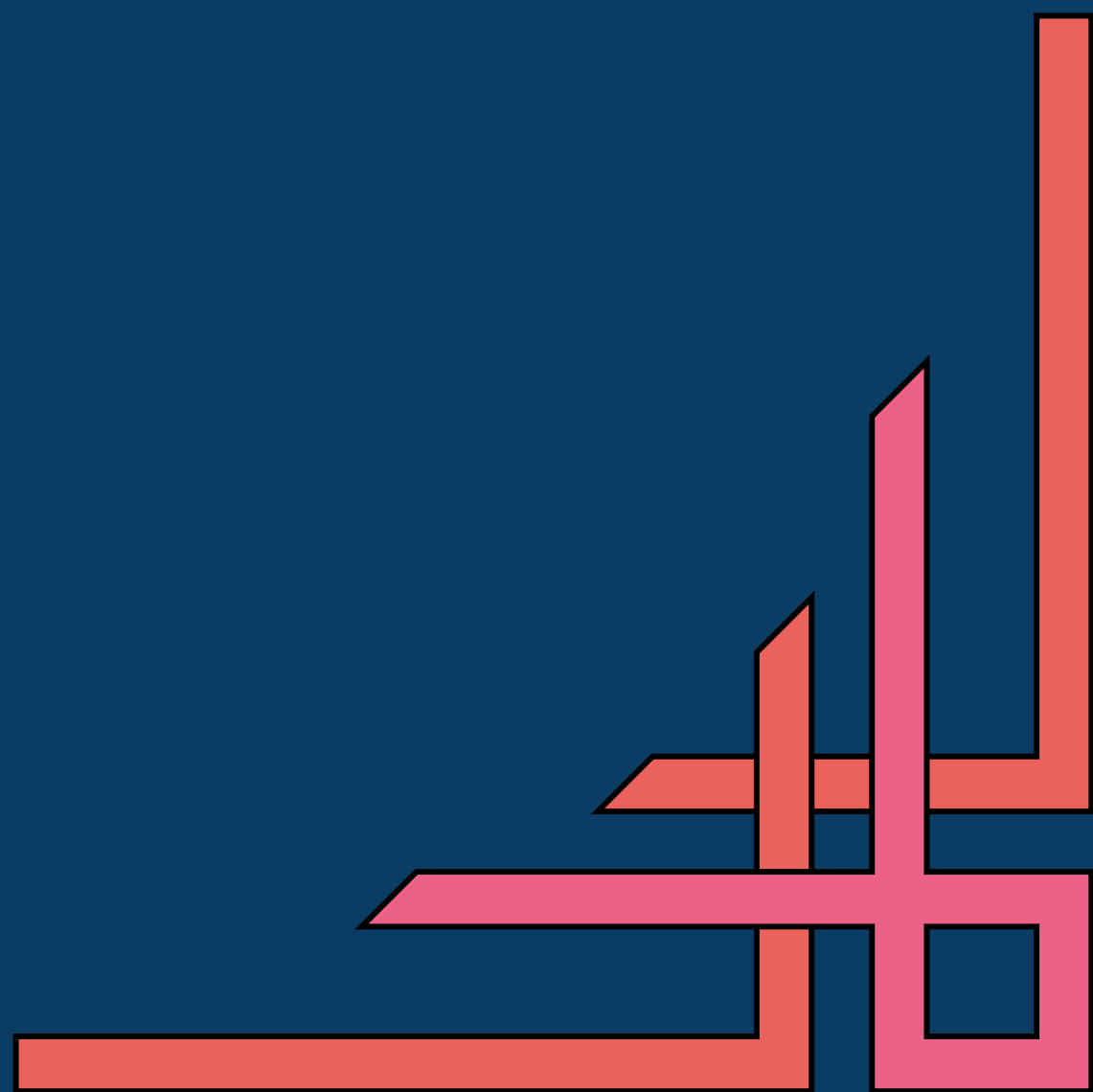
CLICK HERE

# Affirming and Attesting

## Next Steps - Post Affirming and Attesting

After the IEP is affirmed, if the incorrect Meeting Date or Meeting Type was selected:

- If an Amendment has not been added:
  - The Future IEP should be updated with the correct Meeting Date and/or Meeting Type and affirmed.
  - Submit a Student Change form, selecting Manage IEP/CALPADS data to inform the district of the additional affirm. The district will need to remove the incorrect IEP so that it is not reported to CALPADS.
- If an Amendment has been added or another IEP has been held
  - The IEP would not be able to be updated with the correct information as the IEP would not be able to be affirmed after an amendment or another meeting has been held.



# Post Meeting/Post Affirm

## Next Steps – Post Affirming and Attesting

After the IEP is affirmed and attested:

- Make sure the original IEP (with wet signatures) are sent to the SELPA office so they can be placed in the student's special education file.
  - This includes any additional reports or informational items that should be attached to the IEP document.
- Make a copy of the signed (and finalized IEP) to place in your working file.
- Send a copy of the signed (and finalized) IEP to the parent(s)/guardian(s)

