



EmpowerED
Pickerington

Resource Series for Special Education Support
Focus - IEP Process: From Referral to Implementation

Jan 2025

Presenter:
Co Presenter:



Welcome to Student Services

Mission

Our mission is to provide a safe and inclusive learning environment where all students have the opportunity to succeed.

Purpose

To provide educators and families with information about the Whole Child by pursuing and completing evaluations to develop plans to help ensure that students are able to receive a free and appropriate education, regardless of their disability.



District Goals: We will...

- Cultivate **Academic Excellence** by engaging all students in relevant and rich learning experiences that prepare them for career, college, and life.
- Provide **Modern Facilities** that are physically safe and offer diverse opportunities to all students.
- Ensure **Operating Efficiency** to be financially accountable to our community, maximize resources, and ensure that we are lean and efficient.
- Be **Pillars of our Community** by relentlessly pursuing opportunities to engage with all residents.



IEP Process: From Referral to Implementation

Understanding Timelines, Roles, and Team Decision-Making

Facilitators:

Alexa Irwin, Hilary Kalra,
and Joe McClain



Purpose of Presentation

This session is designed to:

- Clarify the special education process in Ohio
- Review required timelines and documentation
- Explain parent and school roles throughout the process
- Strengthen team understanding of evaluation, eligibility, and IEP development



The Big Picture

Special education is a process, not a single meeting or test.

Key components include:

- Referral and concerns
- Evaluation planning and assessment
- Eligibility determination
- IEP development
- Implementation and review

PROCESS

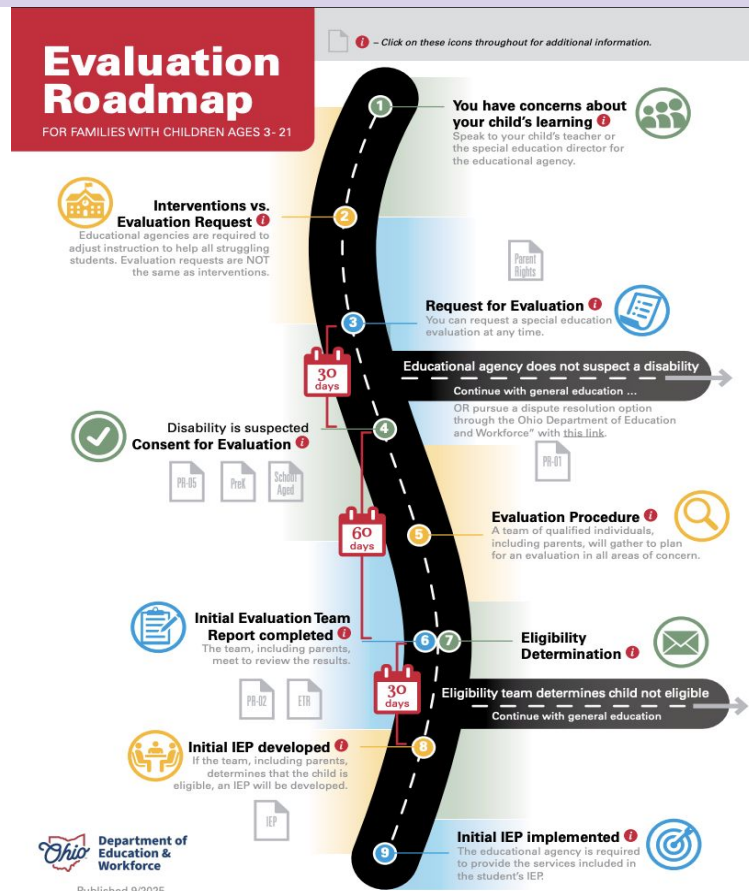


Evaluation Roadmap – From Concern to Services

Evaluation Roadmap: From Concern to IEP Implementation

1. Concerns are identified by parents or school staff
2. A request for evaluation is made
3. The district responds within required timelines (30 days)
4. Evaluation data is collected and reviewed
5. Eligibility is determined by the team An IEP is developed and implemented, if eligible

[Link to ODE Roadmap](#)



Step 1 – Referral for Evaluation

- Anyone may refer a child for a special education evaluation
- Concerns *may* include academic, developmental, behavioral, or social-emotional needs
- Requests may come from parents or the school

Once a referral is received, timelines begin.



District Response to Referral (30 Days)

Within **30 calendar days** of a referral, the district must:

- Obtain parent consent for an evaluation and hold planning meeting
- OR
- Provide Prior Written Notice (PR-01) explaining why the team thinks an evaluation is not needed



Parent Rights at Referral

Parents have the right to:

- Request an evaluation
- Receive Prior Written Notice (PR-01)
- Understand why an evaluation is or is not being conducted
- Receive procedural safeguards

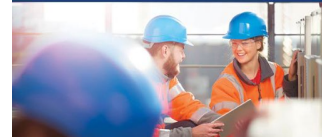
[Link to procedural safeguards](#)

A Guide to Parent Rights in Special Education



Special Education Procedural
Safeguards Notice

April 2025



Department of
Education &
Workforce

Step 2 – Consent & Evaluation Planning

If a disability is suspected:

- Parent consent is required to begin evaluation
- The team meets to plan the evaluation
- Areas of suspected disability are identified
- Existing data are reviewed
- Decisions are made about additional assessment needs



Disability Categories in the State of Ohio

A child with a disability in the state of Ohio is defined by one of 14 categories identified in the [Ohio Operating Standards](#):

1. Autism
2. Intellectual Disability
3. Deaf-Blindness
4. Deafness
5. Emotional Disturbance
6. Hearing Impairment
7. Multiple Disabilities
8. Orthopedic Impairment



9. Other Health Impairment
10. Specific Learning Disability
11. Speech or Language Impairment
12. Traumatic Brain Injury
13. Visual Impairment
14. Developmental Delay (only eligible until child's 10th birthday)

What the Evaluation Planning Form Does

The Evaluation Planning Form:

- Documents team decisions
- Identifies areas to be evaluated
- Ensures assessments are individualized
- Includes parent input as a required component

DISTRICT: _____

SCHOOL-AGE EVALUATION PLANNING FORM (Required)

DATE OF PLAN: _____ ☐ INITIAL EVALUATION ☐ REEVALUATION

CHILD'S NAME: _____ ID NUMBER: _____ DATE OF BIRTH: _____

TEAM CHAIRPERSON: _____

TEAM MEMBERS: _____

SUSPECTED DISABILITY(IES): _____

ASSESSMENT AREAS RELATED TO SUSPECTED DISABILITY(IES)	DATA FOR REVIEW	PERSON RESPONSIBLE FOR ASSESSMENT AND REPORT
Information Provided by Parent		
General Intelligence		
Academic Skills		
Classroom-based Evaluations and Progress in the General Curriculum		
Data from Interventions		
Communicative Status		
Vision		
Hearing		
Social Emotional Status		
Physical Exam/General Health		
Gross Motor		
Fine Motor		
Vocational/Transition		
Background History		
Observations		
Behavior Assessment		
Adaptive Behavior		
Braille Needs		
Audiological Needs		
Assistive Technology Needs		
Other:		

☐ The Team has taken into consideration limited English proficiency to plan this assessment
☐ The Team has taken into consideration possible sources of racial or cultural bias in planning this assessment.

SIGNATURES

School District Representative (Name/Date) _____ Parent/Guardian (Name/Date) _____

General Education Teacher (Name/Date) _____ Intervention Specialist (Name/Date) _____

Step 3 – Evaluation Process (60 Days)

Once consent is obtained:

- The evaluation must be completed within 60 calendar days
- **Multiple** sources of data are collected
- No single test determines eligibility-
“just one piece of the puzzle”



Types of Evaluation Data

Evaluation data may include:

- Academic achievement
- Cognitive or processing data (when appropriate)
- Social-emotional or behavioral information
- Adaptive behavior
- Speech, OT, PT, or related services
- Classroom observations
- Teacher/School staff input
- **YOUR INPUT - you know your child best**

Parent Role During Evaluation

Parents may be asked to provide information about:

- Health history, including birth and pregnancy
- Developmental milestones
- Private therapies or medical services
- Supports used at previous schools
- Social-emotional concerns



IS STINKY HOME?

Step 4 – Eligibility Determination

After evaluation is completed:

- The team meets to review all data
- Eligibility is determined by the full team
- Parents are active members of this decision



Eligibility – The Required Prongs

To qualify for special education, the team must determine:

- A disability is present
- The disability adversely impacts education
- The student requires specially designed instruction

Eligibility is **not based on one score or one assessment**– It is a **team decision**



Diagnosis vs. Educational Disability

- A **medical diagnosis** does not automatically qualify a student
- An **educational disability** is determined by the IEP team
- Educational impact and instructional need must be present



Evaluation Team Report (ETR)

The ETR:

- Summarizes evaluation results
- Identifies strengths and needs
- Documents eligibility decisions
- Directly informs IEP development

ETR Evaluation Team Report

CHILD'S INFORMATION:

CHILD'S NAME: _____ ID NUMBER: _____
STREET: _____ GENDER: _____ GRADE: _____
CITY: _____ STATE: OH ZIP: _____
DATE OF BIRTH: _____
DISTRICT OF RESIDENCE: _____
DISTRICT OF SERVICE: _____

TYPE OF EVALUATION:

☐ INITIAL EVALUATION ☐ REEVALUATION

DATES

DATE OF MEETING: _____
DATE OF LAST ETR: _____
REFERRAL DATE: _____
DATE PARENTS
CONSENT RECEIVED: _____

PARENTS/GUARDIAN INFORMATION

NAME: _____
STREET: _____
CITY: _____ STATE: OH ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
CELL PHONE: _____ EMAIL: _____
NAME: _____
STREET: _____
CITY: _____ STATE: OH ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
CELL PHONE: _____ EMAIL: _____

ETR FORM STATUS

☐ PART 1: INDIVIDUAL EVALUATOR'S ASSESSMENT
(Separate Assessment from each Evaluator)
☐ PART 2: TEAM SUMMARY
☐ PART 3: DOCUMENTATION FOR DETERMINING THE
EXISTENCE OF A SPECIFIC LEARNING DISABILITY
☐ PART 4: ELIGIBILITY
☐ PART 5: SIGNATURES

INSTRUCTIONS

There are four parts to this form, i.e., Part 1, 2, 3 and 4. Parts 1, 2 and 4 must be completed for all initial evaluations and reevaluations. Part 3 must be completed for initial evaluations if the suspected area of disability is Specific Learning Disability. Part 3 must be completed for reevaluations if the child is currently a child identified as having a specific learning disability or the team is considering a change in the child's disability category to Specific Learning Disability.

In Part 1 each member of the evaluation team will list in the "Areas of Assessment" box the area or areas that they will be assessing, i.e., vision, hearing, fine motor, gross motor, emotional/behavioral or intellectual ability. The evaluator will also provide, in Part 1, the evaluation method and strategies used to conduct the assessment by checking the appropriate boxes. A detailed summary of the results of the assessment or assessments will be provided in the "Summary of Assessment Results" section. The evaluator will sign their assessment page and include his or her position title. The date on this section will be the date the evaluator completed his or her assessment.

Part 2 will be completed by the team chair or district representative by gathering all team members' assessments (Part 1) and summarizing them in the boxes provided in Part 2. The interventions summary is completed for both initial evaluations and reevaluations per the instructions found on the form and in Procedures and Guidance for Ohio Educational Agencies serving Children with Disabilities. The reason(s) for the evaluation is also completed for both initial and reevaluations. The summary of information provided by the parents of the child will include information from the referral form as well as any information provided by the parent through behavioral checklists, interviews or meetings, outside evaluations.

Once all assessment information is gathered and summarized, the team will meet and review all information. The team will then describe the child's educational needs based on the information gathered, and state the implications for instruction and progress monitoring in the appropriate text box.

The team will then consider whether or not the child may have a specific learning disability based on the elements found in Part 3. If no one suspects a disability under this category, the team may skip Part 3 and move into Part 4.

In Part 4 the team determines whether or not the child is eligible for special education and related services by addressing each of the statements found in this section. The final text box in this section is completed with the information that supports the team's eligibility determination. All members of the team sign the report at the conclusion of this section. If any team member disagrees with the team's determination, the team member must attach a written statement of disagreement to the report.

Step 5 – IEP Development (30 Days)

If a student is found eligible:

- An IEP must be developed within **30 calendar days**
- Goals and services are based on ETR results
- Parent consent is required for the **initial IEP**

IEP Individualized Education Program		District:
THIS IEP WILL BE IMPLEMENTED DURING THE REGULAR SCHOOL TERM UNLESS NOTED IN SECTION 4 EXTENDED SCHOOL YEAR SERVICES		
CHILD'S INFORMATION		MEETING INFORMATION
NAME:	ID NUMBER:	MEETING DATE:
STREET:	GENDER: ☐ GRADE:	MEETING TYPE:
CITY:	STATE: OH ZIP:	☐ INITIAL IEP
DATE OF BIRTH:		☐ ANNUAL REVIEW
		☐ REVIEW OTHER THAN ANNUAL REVIEW
DISTRICT OF RESIDENCE:	COUNTY OF RESIDENCE:	DISTRICT OF SERVICE:
Is the child in Preschool?	YES ☐ NO ☐	☐ AMENDMENT
Will the child be 14 years old before the end of this IEP?	YES ☐ NO ☐	☐ OTHER
Is the child younger than 14 years of age but has transition and postsecondary goal information?	YES ☐ NO ☐	
Is the child a ward of the state?	YES ☐ NO ☐	IEP TIME LINES
		ETR COMPLETION DATE:
		NEXT ETR DUE DATE:
		IEP EFFECTIVE DATES
		START:
		END:
		NEXT IEP REVIEW:
IEP by 3rd birthday? (If transitioning from Part C services)	YES ☐ NO ☐	
PARENT/ GUARDIAN INFORMATION		IEP FORM STATUS
		(Check when complete)
NAME:		☐ 1. FUTURE PLANNING
STREET:		☐ 2. SPECIAL INSTRUCTIONAL FACTORS
CITY:	STATE: OH ZIP:	☐ 3. PROFILE
HOME PHONE:	WORK PHONE:	☐ 4. EXTENDED SCHOOL YEAR SERVICES
CELL PHONE:	EMAIL:	☐ 5. POSTSECONDARY TRANSITION SERVICES
OTHER INFORMATION:		☐ 6. MEASURABLE ANNUAL GOALS
		☐ 7. SPECIALLY DESIGNED SERVICES
		☐ 8. TRANSPORTATION AS A RELATED SERVICE
		☐ 9. NONACADEMIC AND EXTRA CURRICULAR
		☐ 10. GENERAL FACTORS
		☐ 11. LEAST RESTRICTIVE ENVIRONMENT
		☐ 12. STATEWIDE AND DISTRICT TESTING
		☐ 13. EXEMPTIONS
		☐ 14. MEETING PARTICIPANTS
		☐ 15. SIGNATURES

What an IEP Is- *Individualized Education Plan*

An IEP:

- Is a **legally binding document**
- Outlines goals, services, and supports
- Is **individualized** to the student's needs
- Is reviewed at least **annually**
- Includes **Specially Designed Instruction** (SDI)

Step 6 – IEP Implementation

Once the IEP is finalized:

- Services begin as written
 - Progress toward goals is monitored
 - Parents receive progress updates
 - Adjustments may be made through team meeting.
 - The IEP team can make amendments at any time-
- “working document”**

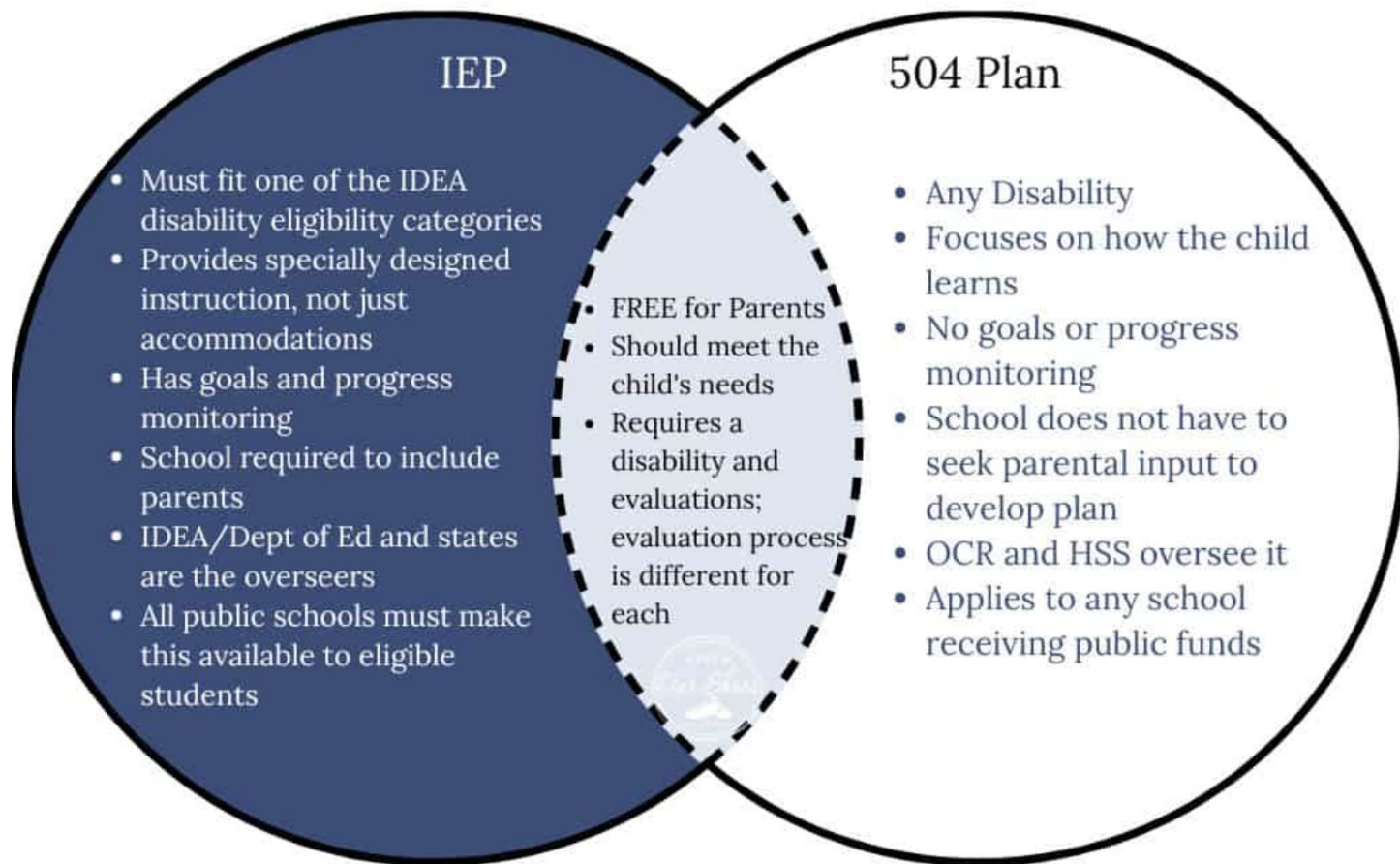


Ongoing Review & Reevaluation

- IEPs are reviewed **annually** and progress is reported quarterly (progress reports)
- Reevaluations occur at least **every 3 years**
- Reevaluations may occur sooner if requested by the team



IEP vs 504 Plan



Key Takeaways

- The Special Education process is structured and timeline-driven
- Parents are essential team members
- Decisions are based on multiple data sources
- The goal is meaningful, individualized student support



Resources & References

- *A Guide to Parent Rights in Special Education* (ODEW, 2025)
- *Evaluation Roadmap for Families with Children Ages 3–21* (ODEW, 2025)
- *Operating Standards for the Education of Children with Disabilities* (ODEW, 2024)
- *Special Education Timelines: A Reference Guide for Families* (State Support Team)

THANK
YOU!



EmpowerED

Pickerington

A Resource Series for Special Education Support

Focus - Supporting Every Learner, Supporting Every Family, Every Day

