Revising the Annual IEP (IEP Revision Procedures for IEP Plus)

A revision to the annual IEP may be completed during an IEP Team meeting or after consultation between the student’s parent and special education case manager.

Case managers shall consult with building administrators to consider the purpose of the revision to the annual IEP, and determine the need to convene the full IEP Team. If the team does not need to meet, the parent must be consulted before the annual IEP form is revised (before the “revise” link is selected that is next to the annual IEP link in IEP Plus).

IEP Revisions proposed for the following reasons shall be conducted with a full IEP Team meeting:

1. Change of placement
   a. Change of building location (must invite a special ed supervisor)
   b. General education to special education classroom
   c. Special education classroom to general education classroom

2. Reevaluation IEP – A Reevaluation IEP must be completed after updated evaluations are completed by members of the Student Support Team.
   a. Change in Disability Category
   b. Updated educational evaluations (i.e. assessment for Read Aloud accommodation)

If the parent does not agree, or if any member of the IEP Team requests a full IEP Team meeting, the case manager shall convene the team at a mutually agreeable date and time.

If the IEP will be revised without a meeting, the procedures for completing an IEP Revision with parent consultation shall be followed.
IEP Revisions, with or without a full IEP Team meeting, require documentation to be completed in IEP Plus, and hard copies filed in the student’s permanent scholastic record.

Refer to the chart below for a summary of the documentation required for IEP revisions:

<table>
<thead>
<tr>
<th>IEP Forms/Documentation</th>
<th>IEP Revision <strong>with an IEP Team Meeting</strong></th>
<th>IEP Revision <strong>without an IEP team meeting</strong> (parent and case manager consult)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEP Team Invitation</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Record</td>
<td>N/A</td>
<td>Yes (The meeting record is automatically generated when the invitation is created)</td>
</tr>
<tr>
<td>IEP Revision Letter</td>
<td>No</td>
<td>Yes (Special Education Blog &gt; Form Library &gt; IEP Revision Letter)</td>
</tr>
<tr>
<td>Meeting Record Contact Dates</td>
<td>Yes</td>
<td>Yes (This is the “log” of parent contact – access from the summary page)</td>
</tr>
<tr>
<td>Revised IEP Form</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Written Notice of Proposed and Refused Action</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Meeting Record Results (summary page)</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Revision to the annual IEP – **with a meeting**

**Step 1:** Complete the **IEP Team invitation**
Meeting Purpose: “Revise the Annual IEP”

**Step 2:** Complete the meeting record (log of parent/staff contacts)
Summary page> meeting>contact dates

**Step 3:** **Revise** the Annual IEP Form:
- Open the “IEP” form
- Make sure the annual IEP is finalized (see below)
  The IEP is finalized if there is a “lock” icon at the end of the IEP link.

### Finalized IEP:

<table>
<thead>
<tr>
<th>Form</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>In Use by</th>
<th>Meeting</th>
</tr>
</thead>
</table>

### Unfinalized IEP:

<table>
<thead>
<tr>
<th>Form</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>In Use by</th>
<th>Meeting</th>
</tr>
</thead>
</table>

If the IEP is **not finalized:**

- Select the unfinalized IEP Link to open the annual IEP form
- Select **Finalize** under the **Validation** menu (left side of the screen)
  Note: Finalizing creates an “archive” of the IEP document.
**After the IEP is finalized**, select “Return”

- Select “Revise” at the end of the IEP link (see below)

**IMPORTANT:** ALWAYS select the “revise” link next to the most recent revision of the annual IEP form. Eventually, there will be a history of the annual IEP (last link) and subsequent revisions. Refer to the screen shot below:

### Note:
1. The **start date** and **end date** for the annual IEP and revisions are the same, but the **meeting date changes** each time a new meeting is scheduled.
2. The form name changes each time a revision meeting/consultation is scheduled.
3. If a fourth revision meeting is scheduled, then the revise link next to “Revision 3” would be selected.
4. The unfinalized link at the top is a new annual IEP in development (notice the change in start and end dates).

**Reminder: Do NOT select “revise” until the annual IEP form is finalized.**
• After the IEP Wizard opens, select the meeting date from the drop down menu.
• Once the “meeting” is selected, the second field will automatically populate with the meeting date. Do not change that date.
• Select “Revise IEP”

A copy of the annual IEP is now available for revisions (see below)
Step 4: Complete the changes to the IEP form

- Change ALL areas of the IEP impacted by the proposed revision.
  For example:
  - Addition of behavior goals
    - Revise the behavior goals or add new goals to the PLOP/goals/objective page
    - Update the Team Considerations page (question 6)

Step 5: Update the cover page
- Meeting Attendees
- Date signed IEP given to the parent and staff member’s name

Step 6: Save and Print the IEP Form.
- Participants sign the cover page
- Parent signs cover page and consent page

Step 7: Finalize the IEP form
Reminder: Any document given to the parent is finalized in IEP Plus (except for the draft IEP).

Step 8: Complete the Written Notice of Proposed and Refused Action
- Select the revised IEP form from the first drop down menu.
- Select the correct IEP letterhead.
- Select “Create form.”

Reminder: “Placement and services” will populate the first field (see below). This information cannot stand alone for an IEP revision, the case manager must select the radio button labeled “Add a Description of Action Statement” and explain the proposed revision.
• Complete the remainder of the Written Notice
  **Reminder: See procedures for completing the written notice**
• Save > Finalize > Print
• Ask the building administrator (LEA rep) to sign the written notice

**Step 9:** Update the **meeting record**
  Summary>meeting results

**Step 10:** **File** the paperwork in the student’s permanent scholastic record.
Revision to the Annual IEP – **without a meeting (parent and teacher consultation)**

**Step 1: Consultation** between parent and teacher:

*Hint: Prior to the telephone conversation with the parent, refer to the IEP Revision letter (attached to these procedures) for additional information.*

- Contact the parent via telephone to discuss the proposed IEP revision.
- Provide the parent with the proposed options to complete the revision:
  - ✓ Convene a meeting of the IEP Team
  - ✓ Complete the revised IEP and supporting documentation and send the documents home for the parent to review and sign.
- Explain to the parent the documents you will be sending for review:
  - ✓ Revised IEP Form
  - ✓ IEP Revision Explanation Letter
  - ✓ Written Notice of Proposed and Refused Action.
- Explain to the parent that they need to sign the consent for services form and return it to school within five calendar days.
- Explain to the parent that if written consent is not returned, it will be assumed they consent to the actions discussed, and the revisions will be implemented as explained in the Written Notice of Proposed and Refused Action.
Step 2: Complete the **Meeting Record (not an invitation):**

- Log-in to IEP Plus and open the student’s record.
- Select the “Meeting” link
- Select “New”
- Meeting Date > Date of parent contact/consultation
- Meeting Time > Do not select a meeting time
- Meeting Type > IEP Revision – Telephone Consultation - Parent
- Location > Student’s program school
- Meeting Reason > Revise the Annual IEP
- Contact Dates
  - ✓ Type: IEP Revision – parent contact – no meeting requested
  - ✓ Contact Dates > Date of contact
Step 3: **Revise** the **Annual IEP** Form:

- Open the “IEP” form
- Make sure the annual IEP is finalized (see below)

  The IEP is finalized if there is a “lock” icon at the end of the IEP link.

**Finalized IEP:**

<table>
<thead>
<tr>
<th>Form</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>In Use by</th>
<th>Meeting</th>
</tr>
</thead>
</table>

**Unfinalized IEP:**

<table>
<thead>
<tr>
<th>Form</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>In Use by</th>
<th>Meeting</th>
</tr>
</thead>
</table>

If the IEP is **not finalized**:

- Select the unfinalized IEP Link to open the annual IEP form
- Select **Finalize** under the **Validation** menu (left side of the screen)

  Note: Finalizing creates an “archive” of the IEP document.

*After the IEP is finalized*, select “Return.”
Select “Revise” at the end of the IEP link (see below)

** Reminder: Do NOT select “revise” until the annual IEP form is finalized.**

- After the IEP Wizard opens, select the meeting date from the drop down menu.
- Once the “meeting” is selected, the second field will automatically populate with the meeting date. Do not change that date.
- Select “Revise the IEP”
A copy of the annual IEP is now available for revisions (see below)

Step 4: Complete the changes to the IEP form

- Change ALL areas of the IEP impacted by the proposed revision.
  For example:
  Addition of behavior goals
  ✓ Revise the behavior goals or add new goals to the PLOP/goals/objective page
  ✓ Update the Team Considerations page (question 6)

**Reminder: Do not change anything in the IEP revision that was not discussed during consultation with the parent.**
Step 5: Update the cover page
   - Date IEP given to the parent/staff member’s name

Step 6: Save and print the IEP Form (this will be sent home to the parent with the written notice of proposed/refused action)

Step 7: Finalize the IEP form

Step 8: Complete the Written Notice of Proposed and Refused Action
   - Select the link to the revised IEP form from the first drop down menu.
   - Select the correct IEP letterhead.
   - Select “Create form.”

**Reminder: The “placement and services” will populate the first field. This information cannot stand alone for an IEP revision, the case manager must select the radio button labeled “Add a Description of Action Statement” and explain the proposed revision.**
• Complete the remainder of the Written Notice  
**Reminder: Refer to the procedures for completing the written notice**  
• Save > Finalize > Print  
• Ask the building administrator (LEA rep) to sign the written notice

**Step 9:** Update the **meeting record**  
• Return to the summary screen  
• Open the meeting record  
• Update the “contact dates”  
  ✓ “IEP Revision paperwork sent to parent for review/consent”  
  ✓ Date sent to the parent

**Step 10:** Update the **meeting results**  
• Update the status of the parent consent  
• “IEP revision – parent signed consent”  
• “IEP revision – 6th day - no signature – proposed change implemented”

**Step 11:** **File** the paperwork in the student’s permanent scholastic record.
Under the provisions in the reauthorization of the Individuals with Disabilities Education Improvement Act (IDEA 2004), school divisions may propose revisions to a student's IEP without convening the entire IEP Team if the parent and school division agree to such action. Recently, your child's case manager contacted you and discussed a revision to your child's IEP. After this consultation, you determined it was not necessary to convene the full IEP Team to complete the proposed revisions; therefore, you are receiving two documents to review: (1) a revised annual IEP and (2) a Written Notice of Proposed and Refused Action. If you consent to the changes, please sign the consent for services page and return it to your child's case manager within five calendar days.

If you do not return the signed consent form within five calendar days, we will assume you are giving consent and the proposed change(s) summarized on the Written Notice of Proposed/Refused Action (form 1394) will take effect on the sixth day. The revisions to your child's IEP will not change the annual review date.

If you have questions about the proposed revision(s) or wish to have a face-to-face meeting with the IEP team, please contact your child's special education case manager or the administrator at your child’s school. If you would like another copy of the Procedural Safeguards, please contact your child's case manager.