

Team Up CHWs		Key Tasks for Individualized Education Plan (IEP)		
	KEY TASKS	DATE COMPLETED/ TEAM MEMBER	NOTES	TIMEFRAME
SCREENING & REFERRAL STAGE	Family permission to start IEP process, if not initiated by family or school			
	Provide information and education on school district and IEP process			
	Obtain signed releases for school and medical providers to communicate			
	If child in EI services, obtain IFSP			
	Obtain any previous medical assessments			
	Obtain any previous IEPs from other school districts			
	Initial letter requesting IEP assessment			Within 5 days district notifies parents and receives consent to evaluate child
	Call family 7 days after IEP process initiated to confirm receipt from district and parent consent obtained to continue with evaluation			
	Work with provider to request specific evaluations (i.e. PT, OT etc.)			
	Document in EMR			
EVALUATION STAGE	Explain process of evaluation and ensure parents consented to evaluation			Within 30 days school district provides comprehensive evaluation
	Address logistical barriers for completion of evaluation: usually completed in the school			
	Help with rescheduling evaluation if needed			
	Check in within 7 days of completed evaluation			
	Document progress in EMR			

ELIGIBILITY STAGE	Get copy of evaluation report from parent and/or school district	Within 45 days of parent consent, team determines eligibility
	If child is not eligible for IEP, help family access additional school-based supports or begin appeal process	
	If child is eligible for IEP, help family engage to develop IEP goals and services	
	Address barriers to parent engagement with school team if needed	
	Document IEP eligibility within EMR	
IEP/504 Plan	Obtain copy of IEP	Within 45 days of consent, IEP plan must be developed
	Obtain date of first IEP meeting and remind parents of first IEP meeting within 3 days of scheduled meeting	
	Help families understand IEP goals and services, including consenting to or requesting changes to recommended IEP "placement" services	Within 30 days of receipt of IEP, parents' consent to IEP services
IEP/504 Plan PROGRESS	Check in with families every 6 months during initial IEP year about services	
	Identify goals for each service: OT, PT, Speech, Counseling, Social Skills Groups	
	Plan ahead for well-child visits to ask parents to bring in IEP progress reports	Annual written progress reports required
	Explain the IEP re-evaluation process	Re-evaluation every 3 years to determine eligibility
	Obtain new signed releases for school and medical providers to communicate	
RESOURCES	MA Department of Education: Special Education http://www.doe.mass.edu/sped/parents.html	

A Parent's Guide to Special Education in
English and Spanish PDF Downloads

<https://fcsn.org/parents-guide>

Parent Professional Advocacy League

<http://ppal.net/>

Mass Advocates for Children

<https://massadvocates.org/specialeducation/>

Federation of Children with Special Needs

<https://fcsn.org/>

Team Up Webinar on "Working With Schools"