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30-Day Education Specialist Checklist

This document was developed to identify the tasks an education specialist may need to complete, in order of relative time-sensitivity, to ensure all necessary components are in place in the beginning of the school year. This checklist is a framework to build upon and may have additions specific to local policies and procedures, as determined by the LEA.

| Completed IEP Files | |
|------------------------------------|---|
| <input type="checkbox"/> | Locate all IEP files for caseload. <i>Note: School site hard-copy IEP files are the “official record” and should be exactly as written in the online IEP records management system (i.e., SEIS). Confidential IEP files should be kept separate from the cumulative file with an indicator in the cumulative file that a confidential file should follow.</i> |
| <input type="checkbox"/> | Create caseload list with updated services, annuals, triennials and Behavior Intervention Plan information. |
| <input type="checkbox"/> | For any missing IEP/confidential files, collaborate with administrative support staff to send a request for files from the student’s previous school. Keep a copy of all requests. |
| | Check that current reports are included in the hard copy IEP file. Reports may include but are not limited to, the areas of: <ul style="list-style-type: none"> <input type="checkbox"/> Psycho-educational assessment; <input type="checkbox"/> Speech and Language Pathologist (SLP); <input type="checkbox"/> Occupational Therapy (OT); <input type="checkbox"/> Physical Therapy (PT); <input type="checkbox"/> Adaptive Physical Education (APE); <input type="checkbox"/> Assistive Technology (AT); <input type="checkbox"/> Any other related service as appropriate. <input type="checkbox"/> Ensure hard copies of current reports are uploaded to the IEP system as attachments. |
| <input type="checkbox"/> | Obtain an IEP system log-in and password from Special Education Administrator/District Level User and successfully log in. |
| <input type="checkbox"/> | Understand the basics of the IEP system. Register for available trainings and seek out district experts for ongoing compliance support. |
| <input type="checkbox"/> | Ensure that all caseload students are entered into the IEP system. Complete “Request to Add” form for incoming students. |
| <input type="checkbox"/> | Ensure general education teachers have the IEP At-A-Glance document. Include information if the student has a Behavior Intervention Plan (BIP) or additional staff support. <i>Tip: Have general education teachers sign that they have received notification of the student’s IEP At-A-Glance document.</i> |
| Learning Environment and Materials | |
| <input type="checkbox"/> | Locate assessment kits and protocols that will be used for Initial IEP and Triennial IEP evaluations. Determine the need to order additional protocols for the upcoming year. |
| <input type="checkbox"/> | Locate any equipment students require as identified in the IEP (e.g., assistive technology devices, FM systems, etc.) and install in the appropriate setting. |
| <input type="checkbox"/> | Use Environmental Considerations checklist to set up space to reflect “inclusive classroom” elements for the instructional environment. Access the checklist by visiting: https://goo.gl/Gec6Jz |
| | Identify space and time for: <ul style="list-style-type: none"> <input type="checkbox"/> a. One-on-one therapy or testing; b. IEP meetings; c. Small group instruction. |
| <input type="checkbox"/> | Create a “break space” area for students that may need this as part of their Behavior Intervention Plan (BIP) or for social-emotional regulation. |
| Your Caseload | |
| <input type="checkbox"/> | Send students and families a welcome letter, postcard, make a phone call, or schedule a ‘meet and greet’. |
| <input type="checkbox"/> | Set the tone for positive collaboration with parents. Call parents to initiate relationship building. |
| <input type="checkbox"/> | For incoming students new to the LEA, prepare the Interim Form to send home on the first day of instruction. <i>Interim IEP meeting to be held within 30 calendar days.</i> |
| <input type="checkbox"/> | Create a master schedule to calendar upcoming annuals and triennials. Backward map dates as needed to give appropriate time for assessment windows. |

| Your Team | |
|-------------------------------------|---|
| <input type="checkbox"/> | Review master calendar with administration team to determine best days and times to hold IEP meetings. Differentiate between the time needed for initial, annual, and triennial IEP meetings. |
| <input type="checkbox"/> | Ensure general education teachers have a clear understanding of how they can best support the student's documented needs from the IEP. |
| <input type="checkbox"/> | Set a positive tone for collaboration within the school team. Initiate a personal relationship with each teacher and office staff member. |
| <input type="checkbox"/> | Begin collaboration with site Student Study Team (SST) and/or Response to Intervention Team (RtI) to learn how to best communicate and collaborate as a member of the team. Discuss the role of a special educator within each of these systems. |
| <input type="checkbox"/> | Collaborate with administration, general education teachers, and paraeducators regarding student schedules and appropriate opportunities for push-in, co-teaching, consultation, co-planning, small group, guided learning, re-teaching, etc. |
| <input type="checkbox"/> | Collaborate with an administrator about scheduling a training with paraeducators to define roles and responsibilities. If possible, discuss a paraeducator learning plan for the school year. |
| <input type="checkbox"/> | Draft paraeducator schedules based on student IEP needs. |
| <input type="checkbox"/> | Orient other providers to spaces where services will be provided. Collaborate to create a schedule with related service providers, including space for assessments, materials and direct services. Determine appropriate communication pathways for student-specific concerns. |
| <input type="checkbox"/> | Develop a system of service logs between all providers and paraeducators. |
| | <p>Develop a communication system with administrative support staff regarding:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Informing special education department of new incoming students with IEPs; <input type="checkbox"/> Forwarding incoming hard-copy IEPs to special education department; <input type="checkbox"/> Notifying special education department when parent requests assessment; <input type="checkbox"/> Notifying special education department immediately if a student with an IEP or 504 receives disciplinary referral or suspension; <input type="checkbox"/> Responding to parent questions, concerns or issues related to IEPs; <input type="checkbox"/> Administering medications to students with IEPs at school; <input type="checkbox"/> Child Find procedures. |
| IEP Files | |
| <input type="checkbox"/> | Follow up with requests for all missing IEP files and psychologist/supplemental service provider reports. |
| <input type="checkbox"/> | Place "Notice of Confidential File" in cumulative folders. |
| Learning Environments and Materials | |
| <input type="checkbox"/> | Ensure Procedural Safeguards brochures are accessible and extra copies are available. |
| <input type="checkbox"/> | If necessary, walk students to locations where services will be provided. |
| Your Caseload | |
| <input type="checkbox"/> | Finalize service schedule. |
| <input type="checkbox"/> | Be present every morning, and at dismissal to meet parents, field questions, and support operations. |
| <input type="checkbox"/> | Introduce special education staff and environments to each student. Develop appropriate communication pathways for when they may need additional support outside the IEP. |
| <input type="checkbox"/> | Schedule Interim IEP meetings within first thirty calendar days of the incoming student's first day of instruction, dependent on specific student's start date. Keep a log documenting scheduling efforts. |
| <input type="checkbox"/> | Incorporate time for baseline assessments, as needed. |
| <input type="checkbox"/> | Send home meeting notices for all known annuals and triennials. Set calendar reminders at appropriate intervals to notify families before their scheduled meeting throughout the year. |

| Your Team | |
|-------------------------------------|---|
| <input type="checkbox"/> | Meet with paraeducators to discuss roles and responsibilities. As is appropriate, ensure they have the IEP At-A-Glance for the student(s) with whom they are working. Determine how data should be collected as well as appropriate communication pathways with all stakeholders throughout the year (e.g., case manager, supplemental service providers, parents, general education teachers). |
| <input type="checkbox"/> | Observe students in the general education classroom. Take notes of teacher and student needs, and follow up with additional support as needed. |
| <input type="checkbox"/> | Be on-call for supporting team members throughout the first week of school. |
| IEP Files | |
| <input type="checkbox"/> | Ensure hard copies of historical reports are uploaded to the IEP system as attachments to the IEP. |
| <input type="checkbox"/> | Update Check-In/Check-Out logs when receiving or sending IEP files. If office personnel does this, confirm update completion. |
| <input type="checkbox"/> | Start to enter CASEMIS data into the online system for students new to the IEP system. |
| <input type="checkbox"/> | Clean up all IEP files. Discard duplicates or non-IEP related items, to be determined by LEA team. |
| Learning Environments and Materials | |
| <input type="checkbox"/> | Consider any adjustments that might be made as needed to the learning environment, dependent on student needs. |
| <input type="checkbox"/> | Review each IEP for compliance. Take note of additions, changes, or corrections that need to be made at the next IEP meeting. A Program Specialist can support a case manager through an IEP file review to ensure IEPs are reasonably calculated to result in educational benefit for each student. |
| Your Caseload | |
| <input type="checkbox"/> | Set up systems to collect data on goals for all students to measure and monitor progress throughout the school year. |
| Your Team | |
| <input type="checkbox"/> | Schedule a meeting with each general education teacher individually to discuss shared students and any outstanding needs not yet supported. Ensure they have an understanding of student needs, accommodations/modifications, and how to best collaborate with one another. |
| <input type="checkbox"/> | Collaborate with administrative team to determine professional learning needs and to develop a professional learning plan for the school year. |
| <input type="checkbox"/> | Identify translation needs for IEP meetings, written translations, or communication. Contact appropriate site personnel for translator scheduling needs. |
| <input type="checkbox"/> | Publicly share the special education department weekly schedule, including supplemental service provider schedules. When changes are made throughout the school year, update all staff. |
| <input type="checkbox"/> | Promote and celebrate the success and accomplishments of the students, families, teachers you support. |