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## Initial Evaluation and Eligibility Process

Prior to the initial determination of a student with a disability, a full comprehensive and individual evaluation must be conducted in all areas related to the suspected disabilities of the student. This section describes the procedures and processes involved in conducting an initial evaluation and determining eligibility for disabilities requiring special education services. Throughout this process, it is the responsibility of the Local Education Agency (LEA) to ensure that the parent(s) of a student are given the opportunity to fully participate.

The LEA conducts initial evaluations in order to determine:

- ❖ If the student is a student with a disability;
- ❖ Whether the student needs special education services;
- ❖ The educational needs of the student; and
- ❖ The present levels of academic achievement and functional performance (related developmental needs) of the student.

This guide is designed for use in conjunction with the Oklahoma Special Education Policies Document and Handbook, specifically in conjunction with Chapter 3: Initial Evaluations and Eligibility.

### Forms

The initial evaluation and eligibility process requires the following forms:

Form 1: Record of Access  
Form 2: Parent Contact  
Form 3: RED  
**RED/MEEGS Evaluation Data**  
Form 4: Parent Consent  
Form 5: MEEGS  
Form 6: Notification of Meeting  
Form 8: Written Notice

Other forms may be necessary:

Form 9: Medical Information  
Form 10: Surrogate Parents Verification of Training  
Form 15: Comment  
Consent for Release of Confidential Information

## Referral Process

If through Child Find activities, a student is considered as possibly having a disability and needing special education services, parents may be asked for their consent to evaluate their child. Special education referrals may be made for a variety of reasons, including but not limited to academic and/or behavioral concerns.

❖ Referral:

Despite the best efforts of schools to remedy deficiencies through interventions in the general education classroom, some students may not be able to attain the skills needed to make adequate progress in the general curriculum. If a disability is suspected as the underlying reason for this, a student is referred for a full comprehensive and individual evaluation. An evaluation must occur before the provision of special education and related services.

❖ Request for Initial Evaluation:

The parent(s) of a student or LEA staff may request an evaluation to determine if the student is a child with a disability. For a preschool child the request for an initial evaluation may result from a screening or from SoonerStart Early Intervention. A school age student should participate in general education intervention(s) prior to the request for an initial evaluation. As a result of general education intervention(s), LEA should have data-based documentation of repeated assessments, which may indicate a basis for a discontinuation of educational interventions, an increase in educational interventions, or a special education referral.

**Handbook:** Chapter 2, Sections 4 and 5; Chapter 3, Section 1

## Parental Rights

Upon a request for an initial evaluation, regardless of the source, the first action the LEA must take is to provide the parents a copy of the *Parents Rights in Special Education: Notice of Procedural Safeguards*.

**Handbook:** Chapter 3, Section 2

## Review of Existing Data

When a request has been made for an initial evaluation of a student, the LEA staff must conduct a Review of Existing Data (RED, OSDE Form 3). **The RED/MEEGS Evaluation Data form should be used to document existing information.** On the basis of the RED, there must be a determination of whether or not additional data will be needed in order to determine:

- ❖ Whether the student has a particular category of disability;
- ❖ The present levels of performance and educational needs of the student; and
- ❖ Whether the student needs special education and/or related services.

This review may be conducted by the group without a meeting. However, it is advisable to complete the review with the group.

**Forms:** Form 3 – Review of Existing Data **and RED/MEEGS Evaluation Data**

**Handbook:** Chapter 3, Section 3

### *Conducting the Evaluation*

Initial evaluations must be conducted within 45 school days. This timeframe begins upon the receipt of parental consent to conduct the evaluation, and ends with the determination of eligibility for special education services.

Every initial evaluation must be approached and designed individually based on the specific concerns and the selection of assessment tools based on the information needed to determine eligibility (34 CFR 300.304-305). The RED/MEEGS Evaluation Data form documents new information from a variety of assessment tools and strategies deemed necessary to determine continued eligibility.

**Forms:** Form 5 – MEEGS and RED/MEEGS Evaluation Data

**Handbook:** Chapter 3, Sections 5 and 6

### *Determining Eligibility*

Upon completion of the evaluation, a group of qualified professionals and the parent(s) of the student must determine whether the student is a student with a disability and whether the student requires special education services. The group should have enough information to support whether or not the student has a disability and whether the student is in need of special education services. Regardless of eligibility, this information should assist the LEA in determining appropriate instruction and supports for the student.

The MEEGS (OSDE Form 5) summarizes new and existing information documented by the RED/MEEGS Evaluation Data form and documents the conclusions and determination of the group.

**Forms:** Form 5 – MEEGS and RED/MEEGS Evaluation Data

**Handbook:** Chapter 3, Section 7

### *When a Student is Eligible*

- ❖ If a student is determined eligible for special education services, an IEP must be developed and evaluation results translate into their present levels of academic achievement and functional performance (Form 7 – Individualized Education Program). See the IEP section in this guide for more information and consult Chapter 4 of the Handbook.

### *When a Student is Not Eligible*

- ❖ If a student meets the definition of a disability category but does not need special education services, she/he will not be determined eligible for special education.
- ❖ If the student has a need for special education services but does not meet the definition of a disability category, she/he will not be determined eligible.
- ❖ When a student is not eligible for a disability category under the IDEA a referral for a Section 504 of the Rehabilitation Act evaluation should be considered.

**Handbook:** Chapter 3, Section 7C

### Form 3: Review of Existing Data

The LEA must initiate the review of existing data if a student has not made adequate progress after an appropriate period of instructional time and implementation of intensive interventions or if a parent requests an evaluation. As part of an initial evaluation, the student’s regular education teacher, parents, a special education teacher, a LEA administrative representative, and other qualified professionals (as appropriate) review all relevant existing information about a student. Parent consent is not needed to conduct a review of existing data. When reviewing existing data, the team must consider the validity and reliability of the information and the resulting interpretations. This includes evaluations and information provided by the parent(s), current classroom-based, local, or State assessments, and observations by teachers and other qualified related services personnel.

While the team may conduct its review without a meeting, input and decision making by all members is essential. If the team determines that additional information is needed, parent consent to collect the additional information must be obtained. The additional information may be in the form of assessment(s), observations, medical reports, or other types of information.

### RED/MEEGS Evaluation Data

The RED/MEEGS Evaluation Data is a required component of both the Review of Existing Data (RED) and the Multidisciplinary Evaluation Group Summary (MEEGS). The areas of documentation include evaluations and information provided by the parent(s), current classroom-based, local, or State assessments, and observations by teachers and other qualified related services personnel. Collection of data from an independent evaluator requires parent consent for the release of confidential information.

The RED/MEEGS Evaluation Data documents the necessary data relevant to the student’s performance. Document only the areas needed for the student. This form, which is completed as part of the Review of Existing Data, should also be used to complete the MEEGS.

### RED/MEEGS Evaluation Data

The RED/MEEGS Evaluation Data is used for both the RED and MEEGS. Prior to gathering any new information, the LEA must have obtained parent consent.

**RED/MEEGS Evaluation Data**

NAME OF CHILD: \_\_\_\_\_ STUDENT ID: \_\_\_\_\_  
FIRST/MIDDLE/LAST

Complete only the areas needed for this child.

AREA	EVALUATION PROCEDURE	PERSON/AGENCY QUALIFICATION	DATE (of information)	COMMENTS, FINDINGS, EDUCATIONAL NEEDS
PARENT INFORMATION CONCERNS/COMMENTS <input type="checkbox"/> Existing  <input type="checkbox"/> New Information				

‘New Information’ is information the LEA collected with Parent Consent (Form 4). All other data is considered ‘Existing Information’.

## Form 5 Multidisciplinary Evaluation and Eligibility Group Summary (MEEGS)

Evaluation procedures and determination of eligibility for the purpose of determining if a student has a disability under 34 CFR § 300.8, and the educational needs of the student, must be conducted in accordance with 34 CFR §§ 300.304 through 300.306.

The evaluation and eligibility group utilizes the MEEGS (OSDE Form 5) and the RED/MEEGS Evaluation Data form to document the full and individual evaluation of the student, utilizing various evaluation procedures which are selected and tailored to assess specific areas of educational functioning and need and not merely those that are designed to provide a single general intelligence quotient or cognitive score. The MEEGS (OSDE Form 5) summarizes new and existing information documented by the RED/MEEGS Evaluation Data form and documents the conclusions and determination of the group. Documentation on the RED/MEEGS Evaluation Data form includes the results from a variety of assessment tools and strategies.

The multidisciplinary evaluation must include relevant and functional information from the home and school, or other age-appropriate settings, to provide a comprehensive perspective of the student's educational needs. Information provided by the parent, and information related to enabling the student to be involved in and progress in the general education curriculum (or for a preschool aged student, to participate in age-appropriate activities), will be compiled to assist the group in determining whether the student has a disability and requires special education services.

**Curriculum Participation**

**A**

Students entering the 9th grade are automatically enrolled in the College Preparatory/Work Ready Curriculum. To participate in the Core Curriculum the parent or legal guardian must complete an opt-out form provided by the school. The curriculum option marked below must match the student's educational records in their cumulative folder.

Select Curriculum:     ACE College Preparatory/Work Ready     Core Curriculum

**Projected Date of Graduation/Program Completion and Type**

**B**

Date \_\_\_\_\_

Standard Diploma     General Educational Development (GED)     Other \_\_\_\_\_

**Vocational Education/Rehabilitation**

**C**

Yes     No    In planning the course of study, is information needed regarding opportunities for vocational education (e.g., high school vocational education courses, school-based training, work study programs, technology education, or area career technology center programs)?

If yes, document date(s) when information was provided to young adult and parent(s). Date: \_\_\_\_\_

Yes     No    By age 16, the young adult has been referred to the vocational rehabilitation counselor in the young adult's school district and the parent(s) and young adult were provided a copy.

Person responsible for the referral: \_\_\_\_\_ Date: \_\_\_\_\_

Name of the Vocational Rehabilitation Counselor: \_\_\_\_\_

**Transfer of Rights/Age of Majority**

**D**

Yes     No    By age 17, have young adult and parent(s) been informed of any transfer of rights at age of majority?

If no explain why: \_\_\_\_\_

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**GUIDANCE:**

- A) Curriculum Participation** – This must match the parent request in the student's cumulative file.
- B) Projected Date of Graduation/Program Completion and Type** – Identify the date of graduation and program type. To earn a high school diploma, a student must earn all required credits for graduation.
- C) Vocational Education/Rehabilitation** – Referral of the student to the vocational rehabilitation (VR) counselor for determination of possible eligibility for vocational rehabilitation services must be indicated. The referral must be made no later than the age of 16. Indicate the month, day, and year of the referral, and the person responsible for making the referral. Also indicate the name of the VR counselor to whom this student has been referred. Indicate if a copy of the referral form was provided to the student and parent(s).
- D) Transfer of Rights/Age of Majority** – By the age of 17, document that the student and the parent(s) have been informed of rights that will transfer to the student upon reaching the age of majority. See Handbook: Chapter 6.

**Indicator 13 Checklist:**

The National Secondary Transition Technical Assistance Center (NSTTAC) has developed a checklist to assist IEP teams in ensuring all required components of the student's transition plan are included. The [NSTTAC Indicator 13 Checklist A](#) is required anytime secondary transition services are included in the student's IEP and must be completed annually. This information is gathered at the district level and reported to the OSDE.

## Overview

### Parental Rights

Upon a request for a reevaluation, the LEA must provide the parents a copy of the *Parents Rights in Special Education: Notice of Procedural Safeguards*.

**Handbook:** Chapter 7, Section 2

### Review of Existing Data

Before gathering new data for a reevaluation of a student, the LEA staff must conduct a Review of Existing Data (RED, OSDE Form 3). **The RED/MEEGS Evaluation Data form should be used to document existing information.** On the basis of the RED, there must be a determination of whether or not additional data will be needed in order to determine:

- ❖ Whether the student continues to need special education and related services.
- ❖ Whether any additions or modifications to the special education and related services are needed to enable the student to meet the measurable annual goals set out in the IEP and enables the student to participate, as appropriate, in the general education curriculum.

This review may be conducted by the group without a meeting. However, it is advisable to complete the review with the group.

**Forms:** Form 3 – Review of Existing **Data and RED/MEEGS Evaluation Data**

**Handbook:** Chapter 7, Section 3

### When Additional Data is Not Necessary

After the review of existing data, the group may determine that no additional data are needed to determine whether the student continues to be a student with a disability, and to determine the student's educational needs.

If the parent(s) requests additional assessments of the student, the LEA may refuse to do so, but must provide the parent(s) with Written Notice of the refusal to conduct the assessments and the reasons for the refusal. The parent(s) may request mediation or due process if they dispute the refusal to conduct an evaluation.

- ❖ If no additional assessments are needed, but the group suspects the student continues to have a disability, move to Reevaluation/Continuation of Eligibility.

**Forms:** Form 8 – Written Notice, Form 5RC – Reevaluation/Continuation of Eligibility

**Handbook:** Chapter 7, Section 3A and Section 4

### When Additional Data is Necessary

After a review of existing data, the team/group should determine which areas need to be assessed in order to continue eligibility and to determine if placement/services are still appropriate.

## Parental Consent

Parental consent must be obtained prior to gathering new data for a reevaluation. The LEA must make reasonable attempts to obtain the informed consent of the parent in order to collect any additional evaluation information after the review of existing data.

If the parent fails to respond to a request to provide consent to gather new data for a reevaluation, the LEA may proceed with the reevaluation process but must provide written notice.

If the parent does not provide consent to gather new data for a reevaluation, the LEA may, but is not required to, pursue the reevaluation procedures by utilizing mediation or requesting a due process hearing.

- ❖ Any area where parental consent has been given for new evaluation data, the new data must be documented on the MEEGS form.

**Forms:** Form 4 - Parent Consent, Form 2 – Record of Parent Contact  
**Handbook:** Chapter 7, Section 3B and Section 4

## Conducting the Evaluation

Every reevaluation must be approached and designed individually based on the specific concerns and the selection of assessment tools needed to determine the continuation of eligibility (34 CFR 300.303-305). The RED/MEEGS Evaluation Data form documents new information from a variety of assessment tools and strategies deemed necessary to determine continued eligibility. If the student is deemed eligible, the evaluation results translate into his/her present levels of academic achievement and functional performance on the IEP.

**Forms:** Form 5 – MEEGS and RED/MEEGS Evaluation Data  
**Handbook:** Chapter 7, Section 5C

## Determining Eligibility

Upon completion of the reevaluation, a group of qualified professionals and the parent(s) of the student should have enough information to determine whether the student continues to be a student with a disability and whether the student continues to require special education services. The group should be able to describe where the student is currently performing as well as describe how (or if) the student's unique learning characteristics are impacting his/her ability to access and make progress in the general education curriculum (or for early childhood, to participate in appropriate activities). Regardless of eligibility, this information should assist the LEA in determining other appropriate instruction and supports for the student.

When additional assessments are necessary to determine continued eligibility, The MEEGS (OSDE Form 5) summarizes new and existing information documented by the RED/MEEGS Evaluation Data form and documents the conclusions and determination of the group. When additional assessments are not necessary to determine continued eligibility, the

Reevaluation/Continuation of Eligibility (OSDE Form 5RC) documents the conclusion and determination of the group.

**Forms:** Form 5 – MEEGS and RED/MEEGS Evaluation Data  
-or-

Form 5RC – Reevaluation/Continuation of Eligibility

**Handbook:** Chapter 7, Sections 6

### *When a Student is Eligible*

- ❖ If a student continues to be eligible for special education services, the IEP team will determine the present levels of performance and whether any additional services and/or program modifications are needed. The present levels of performance may warrant revisions to the current IEP or development of a new IEP.

### *When a Student is No Longer Eligible*

- ❖ If a student meets the definition of a disability category but no longer needs special education services, she/he will not be determined eligible for special education.
- ❖ If the student has a need for special education services but no longer meets the definition of a disability category, she/he will not be determined eligible.
- ❖ When a student is no longer eligible under IDEA, a referral for Section 504 of the Rehabilitation Act evaluation should be considered.

**Handbook:** Chapter 3, Section 7C & Chapter 7, Section 6

### *Written Notice*

The LEA must provide Written Notice to the parent(s) that describes any action the LEA proposes/refuses. The purpose of providing written notice to the parents is so they understand what action the LEA is proposing or refusing and the basis used for determining the action.

**Forms:** Form 8 – Written Notice

**Handbook:** Chapter 11, Section 4

### Form 3: Review of Existing Data

A LEA must initiate the review of existing data at the beginning of the reevaluation process. As part of a reevaluation, the IEP team reviews all relevant existing information about a student. Parent consent is not needed to conduct a review of existing data. When reviewing existing data, the IEP team must consider the validity and reliability of the information and the resulting interpretations. This includes evaluations and information provided by the parent(s), current classroom-based, local, or State assessments, and observations by teachers and other qualified related services personnel.

While the team may conduct its review without a meeting, input and decision making by all members is essential. If the team determines that additional information is needed, parent consent to collect the additional information must be obtained. The additional information may be in the form of assessment(s), observations, medical reports, or other types of information.

### RED/MEEGS Evaluation Data

The RED/MEEGS Evaluation Data is a required component of both the Review of Existing Data (RED) and the Multidisciplinary Evaluation Group Summary (MEEGS). The areas of documentation include evaluations and information provided by the parent(s), current classroom-based, local, or State assessments, and observations by teachers and other qualified related services personnel. Collection of data from an independent evaluator requires parent consent for the release of confidential information.

The RED/MEEGS Evaluation Data documents the necessary data relevant to the student’s performance. Document only the areas needed for the student. This form, which is completed as part of the Review of Existing Data, should also be used to complete the MEEGS.

### RED/MEEGS Evaluation Data

The RED/MEEGS Evaluation Data is used for both the RED and MEEGS. Prior to gathering any new information, the LEA must have obtained parent consent.

**RED/MEEGS Evaluation Data**

NAME OF CHILD: \_\_\_\_\_ STUDENT ID: \_\_\_\_\_  
FIRST/MIDDLE/LAST

Complete only the areas needed for this child.

AREA	EVALUATION PROCEDURE	PERSON/AGENCY QUALIFICATION	DATE (of information)	COMMENTS, FINDINGS, EDUCATIONAL NEEDS
PARENT INFORMATION CONCERNS/COMMENTS <input type="checkbox"/> Existing  <input type="checkbox"/> New Information				

‘New Information’ is information the LEA collected with Parent Consent (Form 4). All other data is considered ‘Existing Information’.

## Form 5 Multidisciplinary Evaluation and Eligibility Group Summary (MEEGS)

Evaluation procedures and determination of eligibility for the purpose of determining if a student continues to have a disability under 34 CFR § 300.8, and the educational needs of the student, must be conducted in accordance with 34 CFR §§ 300.304 through 300.306.

The evaluation and eligibility group utilizes the MEEGS (OSDE Form 5) and the RED/MEEGS Evaluation Data form to document the full and individual evaluation of the student, utilizing various evaluation procedures which are selected and tailored to assess specific areas of educational functioning and need and not merely those that are designed to provide a single general intelligence quotient or cognitive score. The MEEGS (OSDE Form 5) summarizes new and existing information documented by the RED/MEEGS Evaluation Data form and documents the conclusions and determination of the group. Documentation on the RED/MEEGS Evaluation Data form includes the results from a variety of assessment tools and strategies.

The multidisciplinary evaluation must include relevant and functional information from the home and school, or other age-appropriate settings, to provide a comprehensive perspective of the student's educational needs. Information provided by the parent, and information related to enabling the student to be involved in and progress in the general education curriculum (or for a preschool aged student, to participate in age-appropriate activities), will be compiled to assist the group in determining whether the student continues to have a disability and requires special education services.

## Related Services Procedures Regarding Testing and Dismissal

### Related Services During the Reevaluation Process (as a Continuation of Eligibility)

The reevaluation process is **required** every 3 years, or more often, if needed, to determine:

- If the student continues to be a student with a disability;
- The educational needs of the student; and, subsequently,
- The present levels of academic achievement and functional performance of the student;
- Whether the student continues to need special education and **related services**; and
- Whether any **additions** or modifications to the special education and **related services** are needed to enable the student to meet the measurable annual goals set out in the IEP and to participate, as appropriate, in the general education curriculum.

#### A. Testing for Related Services During the Reevaluation Process

If the IEP team needs to conduct an evaluation regarding the provision of related services for a student with a disability, they may do so during the reevaluation process. If the team is not conducting any evaluation related to determining the continued eligibility of a student there is no need to fill out the MEEGS (OSDE Form 5); the team will instead utilize OSDE Form 5RC (Reevaluation/Continuation of Eligibility). However, all steps of the reevaluation process must be taken.

- 1) Schedule the Reevaluation meeting with the parent and send Notification of Meeting (OSDE Form 6) with the “Reevaluation…” box checked.
- 2) Complete the RED form (OSDE Form 3) and the RED/MEEGS Evaluation Data form to document “presenting concerns” and other information. On the signature page of the RED complete “Team Recommended Action” and check box for “No Additional Assessments” and state that that team is not questioning eligibility, but is requesting updated evaluation data in the area of \_\_\_\_\_ ex. Speech/Language or Occupational Therapy.
- 3) For purposes of the reevaluation process, complete OSDE Form 5RC (Reevaluation/Continuation of Eligibility). If any additions, modifications, or changes need to be made to the student’s services as a result of the evaluation for related services, check “Yes” for the appropriate area on the 5RC form and describe the changes necessary as a result of the evaluation for related services. Even though additional testing was obtained, you will not complete a MEEGS since this is not a change in disability category. Testing for related services is not an evaluation to determine eligibility for special education.
- 4) Complete a Written Notice (OSDE Form 8) describing that the LEA “proposes” to “initiate” “Other” and write “obtaining parent consent for related services testing”. Obtain Parent Consent by completing OSDE Form 4; check “Other” and write “testing for related services” on pg. 1 and

then check the appropriate evaluation procedure(s) on pg. 2. Provide parent(s) with *Parents Rights in Special Education: Notice of Procedural Safeguards*.

- 5) Upon receipt of the requested evaluation, schedule an IEP meeting with the parent. Send Notification of Meeting (OSDE Form 6) with the box checked with “Review of Placement/IEP.” Check also the “Other Options” and state “consideration of related services.”
- 6) The IEP team will meet with the Related Service Provider and the evaluation will be explained. The team will consider the Provider’s recommendation and determine if the related service is or is not required to assist the student with a disability to benefit from special education.
- 7) If a related service is determined to be required the evaluation information should be added to pg. 1 of the IEP (OSDE Form 7) under “Current Assessment Data” and “Objective Statements.” The Services Page of the IEP will also need to reflect the provision of the related service.

Other pages on the IEP may also need to reflect the provision of a related service:

- Strengths/Needs, Special Factors, and Parent Concerns
- Services (regarding participation in the general education curriculum)
- Goals and Short Term Objective Benchmarks
- Signature Page (“Documentation of LRE Placement Considerations”)

- 8) Complete Written Notice (OSDE Form 8) and check the boxes “Proposed” and “Change” for “Educational Placement/Services” and “Provision of....FAPE”. You are proposing to change the current services on the IEP to now include ex. Speech Therapy for 30 minutes 2 X weekly. Complete the rest of the form as appropriate.
- 9) Because this was completed through the Reevaluation process, the Reevaluation date will change.

## B. Dismissing a Related Service During the Reevaluation Process

If you are dismissing a related service through the Reevaluation process and are not conducted any testing related to eligibility for special education, complete OSDE Form 5RC (Reevaluation/Continuation of Eligibility) along with all other necessary steps for the Reevaluation process.

- 1) Schedule the Reevaluation meeting with the parent and send Notification of Meeting (OSDE Form 6) with the “Reevaluation.....related services needed” box checked and the “Review of Placement/IEP” box checked.
- 2) Complete the RED form (OSDE Form 3) and the RED/MEEGS Evaluation Data form to document “presenting concerns” and other information. Complete “Team Recommended Action” and check box for “No Additional Assessments Needed.” Under “Justification/Recommendations” note that the related service is no longer necessary to help the student benefit from special education. At the meeting, the Related Service Provider should explain why the related service is no longer required.

3) On OSDE Form 5RC check “Yes” for “Are there any significant changes in the special education and related services which are needed by the child, as a result of reviewing existing data for reevaluation?” State that the student no longer requires the related service (speech, OT, etc.) to benefit from special education.

4) If the related service is determined to be no longer required, information on pg. 1 of the IEP (OSDE Form 7) under “Current Assessment Data” and “Objective Statements” should be revised as appropriate. The Services Page of the IEP will also need to reflect the change.

Other pages on the IEP may also need to be revised due to the cessation of a related service:

- Strengths/Needs, Special Factors, and Parent Concerns
- Services (regarding participation in the general education curriculum)
- Goals and Short Term Objective Benchmarks
- Signature Page (“Documentation of LRE Placement Considerations”)

5) Complete Written Notice (OSDE Form 8) and check the boxes “Proposed” and “Change” for “Educational Placement/Services” and “Provision of....FAPE”. You are proposing to cease the related services. Complete the form as appropriate.

## C. Reevaluation Forms Checklist

- Record of Access (OSDE Form 1)
- Parent Contact (OSDE Form 2)
- Review of Existing Data (OSDE Form 3)
- RED/MEEGS Evaluation Data Form
- Parent Consent (OSDE Form 4) (if an evaluation is needed to test for Related Services)
- Notification of Meeting (OSDE Form 6)
- Reevaluation/Continuation of Eligibility (OSDE Form 5RC)
- Individualized Education Program (OSDE Form 7)
- Written Notice (OSDE Form 8)

## Related Services During the IEP Process

### A. Testing for Related Services During the IEP Process

If the IEP team needs to conduct an evaluation regarding the provision of related services to meet the needs of a student with a disability and the reevaluation is not due, the team may do so during the IEP process.

- 1) Schedule a meeting with the parent to obtain Parent Consent and send Notification of Meeting (OSDE Form 6) with the “Other Options” and write “obtaining parent consent for related services testing”. For Parent Consent (OSDE Form 4), check “Other” and write “testing for related services” on pg. 1 and then check the appropriate evaluation procedure(s) on pg. 2. Provide parent(s) with *Parents Rights in Special Education: Notice of Procedural Safeguards*.
- 2) Upon receipt of the requested evaluation, schedule the IEP meeting with the parent. Send Notification of Meeting (OSDE Form 6) with the box checked with “Review of Placement/IEP.” Check also the “Other Options” and state “consideration of related services.”
- 3) The IEP team will meet with the Related Service Provider and the evaluation will be explained. The team will consider the Provider’s recommendation and determine if the related service is required to assist the student with a disability to benefit from special education.
- 4) If a related service is determined to be required the evaluation information should be added to pg. 1 of the IEP (OSDE Form 7) under “Current Assessment Data” and “Objective Statements.” The Services Page of the IEP will also need to reflect the provision of the related service.

Other pages on the IEP may also need to reflect the provision of a related service:

- Strengths/Needs, Special Factors, and Parent Concerns
- Services (regarding participation in the general education curriculum)
- Goals and Short Term Objective Benchmarks
- Signature Page (“Documentation of LRE Placement Considerations”)

- 5) Complete Written Notice (OSDE Form 8) and check the boxes “Proposed” and “Change” for “Educational Placement/Services” and “Provision of....FAPE”. You are proposing to change the current services on the IEP to now include ex. Speech Therapy for 30 minutes 2 X weekly. Complete the rest of the form as appropriate.

## B. Dismissing a Related Service During the IEP Process

If a student no longer requires a related service to benefit from special education, the IEP team may dismiss the student from the related service through the IEP process.

- 1) Schedule the IEP meeting with the parent and send Notification of Meeting (OSDE Form 6) with the “Review of Placement/IEP” box checked. At the meeting, the Related Service Provider should explain why the related service is no longer required.
- 2) If a related service is determined to be no longer required information on pg. 1 of the IEP (OSDE Form 7) under “Current Assessment Data” and “Objective Statements” should be revised as appropriate. The Services Page of the IEP will also need to reflect the change.

Other pages on the IEP may also need to be revised due to the cessation of a related service:

- Strengths/Needs, Special Factors, and Parent Concerns
- Services (regarding participation in the general education curriculum)

- Goals and Short Term Objective Benchmarks
- Signature Page (“Documentation of LRE Placement Considerations”)

3) Complete Written Notice (OSDE Form 8) and check the boxes “Proposed” and “Change” for “Educational Placement/Services” and “Provision of....FAPE”. You are proposing to cease the related services. Complete the form as appropriate.

### C. Annual IEP Forms Checklist

- Record of Access (OSDE Form 1)
- Parent Contact (OSDE Form 2)
- Parent Consent (OSDE Form 4)
- Notification of Meeting (OSDE Form 6)
- Individualized Education Program (OSDE Form 7)
- Written Notice (OSDE Form 8)