

Step-by-Step Instructions for Initial IEPs


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Procedures such as adding events or event groups and locking are illustrated in the User Guide online at www.sandi.net/encore/readandlearn/handbooks. Many procedures such as locking are also illustrated in job aids at <http://www.sandi.net/encore/readandlearn/jobaids>. Not all situations are described below. For additional information, contact Encore Support.

Follow the steps below to create a referral and initial IEP.


- Open Encore. Log in and navigate to the Special Ed events screen for the desired student. The screen should say “No records to display” since the student is not in special ed.
- Complete Steps One through Three.

Step One: Create and complete a Referral

1. Click on ADD EVENT GROUP
 2. Select the checkbox for Referral
 3. Click on CREATE
 4. Click on Referral
 5. Complete form, save and close
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6. Click on CHECK COMPLIANCE
 7. Click on blue LOCK in upper left-hand corner
 8. Click on LOCK in upper right-hand corner
 9. Click on SAVE

The system will generate an initial assessment plan.

Step Two: Complete the Initial Assessment Plan

1. Click on Initial Assessment Plan
 2. Complete Assessment Plan p. 1, 2, 3, print and get signature
 3. Make sure you are in the Forms section and that you see the list of assessment plan forms
 4. Click on ADD EVENT
 5. Select the checkbox for Consent - Initial Assessment
 6. Click on CREATE
 7. Click on Assessment Plan p. 3 (Make sure it is underlined)
 8. Enter Parent Acknowledgment section info, save and close
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9. Click on CHECK COMPLIANCE
 10. Click on blue LOCK in upper left-hand corner
 11. Click on LOCK in upper right-hand corner (Add info if requested)
 12. Click on SAVE.

The system will generate an Initial IEP Meeting.

Step Three: Complete the Initial IEP Meeting

1. Click on Initial IEP Meeting
2. Complete Assessment Report p. 1, 2, 3, Present Levels p. 1, 2
3. **OPTIONAL:** Add Additional Assessment Reports if needed
 - A. Make sure you are in the Forms section and that you see the list of IEP forms
 - B. Click on ADD EVENT
 - C. Select the checkbox for Additional Assessment Report x
 - D. Click on CREATE

If eligible for special ed, continue with Step 4.



If not eligible, complete Steps 7-12 then go to Step 17.

4. Click on ADD EVENT
5. Select the checkbox for Develop Initial IEP
6. Complete Special Factors p. 1, 2, Goals and all other necessary forms
7. Click on IEP Signature Page (Make sure it is underlined)
8. Click on IEP p. 1 (Make sure it is underlined) and complete the form except the services section)
9. Complete Meeting Notice
10. Click on Lock checkbox (Locking the meeting notice allows you to enter the information about the parent's response and then makes another meeting notice available in case you need to change the meeting.)
11. Open the locked notice and complete the parent section including the date received at the bottom right

At/After the meeting:

12. Enter all changes and additions by clicking on each form that has changes

If the parent agrees to the entire IEP, continue with Step 13.



If the parent does not give consent, document on IEP Team Action and go to Step 17.

13. Make sure you are in the Forms section and that you see the list of IEP forms
14. Click on ADD EVENT
15. Select the checkbox for Consent - Initial Placement (if not eligible, Consent - Exit)
16. Click on CREATE
17. Click on IEP Signature Page and enter signature info



18. Click on CHECK COMPLIANCE
19. Click on blue LOCK in upper left-hand corner
20. Click on LOCK in upper right-hand corner (Add info if requested.)
21. Click on SAVE.

The system will generate an Annual Review and a Triennial Assessment Plan for future use.