

Completing Forms in the Correct Order

Information flows from some forms to other forms and users need to make sure to put the information into Encore correctly. To complete IEPs with fewer problems, users should complete the forms in the order shown below. After the meeting, print out the forms and staple them as indicated below before placing them in the container.

Order for Completing Forms in Encore	Order for Stapling Forms
Initial IEP, Triennial Review	
<i>Referral-Lock</i> (if Initial)	<i>IEP</i> p. 1
<i>Assessment Plan</i> p. 1, 2, 3 (Add Event for correct Consent and Lock)	<i>Signature Page</i>
<i>Assessment Report</i> p. 1, 2, and 3	<i>IEP Team Action</i> if needed
<i>Present Levels</i> p. 1, 2	<i>Present Levels</i> p. 1, 2
If eligible, Add Event	<i>Special Factors</i> p. 1 & 2
<i>Special Factors</i> p. 1 & 2	<i>Special Factors Accommodations</i> if needed
<i>Special Factors Accommodations</i> if needed	<i>Transition Plan</i> if needed
<i>Transition Plan</i> if needed	<i>Goal</i>
<i>Goal</i>	Any optional forms such as <i>BSP</i>
<i>Signature Page</i>	<i>Assessment Report</i> p. 1, 2, and 3
<i>IEP</i> p. 1	<i>Meeting Notice</i>
<i>Meeting Notice</i> (can actually be completed at any time)	<i>Referral</i> (if Initial)
Any optional forms such as <i>BSP</i>	<i>Assessment Plan</i> p. 1, 2, 3
If parent agrees to IEP, Add Event for correct Consent	
<i>Signature Page</i> , <i>IEP Team Action</i> if needed, any other forms with changes	
Lock	
Annual Review	
<i>Present Levels</i> p. 1, 2	<i>IEP</i> p. 1
<i>Special Factors</i> p. 1 & 2	<i>Signature Page</i>
<i>Special Factors Accommodations</i> if needed	<i>IEP Team Action</i> if needed
<i>Transition Plan</i> if needed	<i>Present Levels</i> p. 1, 2
<i>Goal</i>	<i>Special Factors</i> p. 1 & 2
<i>Signature Page</i>	<i>Special Factors Accommodations</i> if needed
<i>IEP</i> p. 1	<i>Transition Plan</i> if needed
<i>Meeting Notice</i> (can actually be completed at any time)	<i>Goal</i>
Any optional forms such as <i>BSP</i>	Any optional forms such as <i>BSP</i>
If parent agrees to IEP, Add Event Consent-Annual	<i>Meeting Notice</i>
<i>Signature Page</i> , <i>IEP Team Action</i> if needed, any other forms with changes	
Lock	