

# Step-by-Step Instructions for Triennial Reviews

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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](http://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 complete a Triennial Review.*

- Open Encore. Log in and navigate to the Special Ed events screen for the desired student.
- Complete Steps One and Two.

## Step One: Complete the Triennial Assessment Plan

1. Click on Triennial Assessment Plan
2. Complete Assessment Plan p. 1, 2, 3, print, 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 – Triennial Assessment
6. Click on CREATE
7. Click on Assessment Plan p. 3 (Make sure it is underlined)
8. Enter Parent Acknowledgment section info
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 a Triennial Review of Eligibility.

## Step Two: Complete the Triennial Review of Eligibility

1. Click on Triennial Review of Eligibility
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 Reportx
  - D. Click on CREATE
4. Complete the Meeting Notice
5. Click on Lock box
6. Open the locked notice and complete the parent acknowledgement section including the date received at the bottom right

If Eligible, continue with Step 7.



If not eligible, go to Step 11

7. Click on ADD EVENT
8. Select the checkbox for IEP Annual Review
9. Click on CREATE
10. Complete Special Factors p. 1, 2, Goals and all other necessary forms in the Annual Review event by clicking on each form
11. Click on IEP Signature Page (Make sure it is underlined)
12. Select Primary Service Options Recommended
13. Click on IEP p. 1 (Make sure it is underlined) and complete the form

At/After the meeting

14. Enter all changes and additions by clicking on Triennial Review Meeting and each form desired

If the parent agrees to the entire IEP, continue with Step 15.



If the parent does not give consent, document on IEP Team Action and go to Step 19.

15. Make sure you are in the Forms section and that you see the list of IEP forms
16. Click on ADD EVENT
17. Select the checkbox for Consent – Annual (If not eligible, select Consent – Exit)
18. Click on CREATE
19. Click on IEP Signature Page and enter signature info



20. Click on CHECK COMPLIANCE
21. Click on blue LOCK in upper left-hand corner
22. Click on LOCK in upper right-hand corner (Add info requested)
23. Click on LOCK again
24. Click on SAVE

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