

Farmington Municipal Schools

Staff *Guide* of Policies and Procedures of the Exceptional Programs Office



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PURPOSE OF THE EXCEPTIONAL PROGRAMS OFFICE STAFF GUIDE OF POLICIES AND PROCEDURES

The purpose of the Exceptional Programs Office Staff Guide of Policies and Procedures is to supplement, not supplant, the New Mexico Public Education Department [Laws, Rules & Guidance](#). If a conflict in guidance is identified, NMPED Law, Rules & Guidance, and federal and state statutes overrule all special education district guidelines.

SPECIAL EDUCATION RESOURCES AND LINKS

Special education staff, teachers, and administrators are urged to familiarize themselves with the following resources and links:

- ❖ New Mexico Public Education Department [Office of Special Education \(OSE\)](#). All technical assistance manuals, federal and state statutes, and NMPED guidance documents can be found [here](#).
- ❖ www.specialedconnection.com - Special Ed Connection, through LRP Publications, is an online reference center for all types of special education questions and needs. It includes daily articles, judicial and administrative decisions, state-specific pages, *SmartStarts*, and more. This site is restricted to Farmington Municipal School district Staff only.
- ❖ Username: nm3500990 Password: secnm2025
- ❖ [NMAC 6.31.2](#) - New Mexico Special Education Rules
- ❖ [IDEA Federal Regulations](#) - Individuals with Disabilities Act (IDEA) 2004 Regulations - Supplemental (December 1, 2008)
- ❖ [FERPA](#) - Family Education Rights and Privacy Act
- ❖ [Exceptional Programs Office](#) website - [Farmington Municipal Schools portal page](#)
- ❖ Need an Interpreter? Click on the [link](#) for instructions.

FARMINGTON MUNICIPAL SCHOOLS CONTACT INFORMATION

- ❖ FMS CENTRAL OFFICE/EXTENSION [DIRECTORY](#)
- ❖ EPO OFFICE/EXTENSION [DIRECTORY](#)
- ❖ FACILITATOR, RELATED SERVICES, SCHOOL SITE SPECIALIST [DIRECTORY](#)

PDP/EVALUATION PROCESS

All EPO Staff will be assessed and observed by an Administrator and will take into account all evidence collected throughout the year that describe the full range of educator practice. Certified staff evaluation and professional growth cycle will begin with a Professional Development Plan (PDP) with goal setting that supports the Farmington Model of Instruction (FMI) and/or Farmington Municipal Schools' High Reliability Schools (HRS) initiative. The PDP will also include baseline self-reflection in preparation of how they will support their schools and department for the school year. Certified staff will also identify a personal growth goal impacting professional behavior.

The Certified Staff Member and Administrator Evaluator will use the PDP throughout the year and will specifically revisit the document during a Mid-Year Review and an End-of-Year Summative Conference. Furthermore, the staff member and evaluator will participate in additional collections of evidence, including an observation cycle, in order to gauge and support that staff member's progress.

The organization of the PDP will support the FMS district commitments ([The Farmington Way](#)):

Why: We are Rising to Excellence in Every Pursuit

How: We provide all children with rigorous, relevant and engaging learning experiences through instructional systems of:

- ❖ Safe, Supportive and Collaborative Culture
- ❖ Effective Teaching through the Farmington Model of Instruction
- ❖ Guaranteed and Viable Curriculum
- ❖ Standards-Referenced System

What: Our instructional infrastructure is an exemplary educational model, with evidence and research-based strategies that yield high instructional results.

MENTORS

EPO Administration will assign a mentor to each staff member new to Farmington Municipal Schools Exceptional Programs Office (evaluator, related service, facilitator). The mentor will assist the new staff member with any questions, provide the staff member with information regarding Farmington Municipal Schools Exceptional Programs Office policies and procedures, and assist in understanding and following all procedures in order to comply with federal and state regulations. Mentorship will include review and support of processes specific to the professional group within the department and aligned with district expectations for mentorship.

PLC/STAFF MEETINGS

All EPO Staff Members are required to attend their scheduled PLC/Staff Meetings. PLC meeting dates and locations will be determined by the EPO Director/Assistant Director and placed on the staff members' Google Calendars. Attendance at scheduled PLC meetings is mandatory for all EPO certified staff members and related service providers.

Weekly Meeting:

EPO Leadership Team

Monthly Meetings:

EPO Diagnostician Team

EPO Speech Language Pathology/Audiology Team

EPO Motor/TVI/O & M Teams

School Site Specialists

Monthly meetings consist of information and process dissemination and discussion. Agendas are available at any time where staff can add questions/concerns/clarifications. Each agenda begins with celebrations. Staff are provided with direction and notes from all meetings are available as an ongoing resource to all EPO and FMS special education staff.

The PLC Framework addresses key questions and has three big ideas in mind: 1) a focus on learning guided by the knowledge, skills, and dispositions that will enable learning beyond K-12 systems, 2) a collaborative culture where members take collective responsibility for students and 3) results oriented, assessing their effectiveness on the basis of results rather than intentions. *(please note that questions 5 & 6 are directly related to teacher/school actions)*. The critical questions of learning in the PLC process can be found in the [Teachers' Guide 4 Critical Commitments](#) on page 4.

TEST AND THERAPY MATERIALS**Test Kits**

Farmington Municipal Schools supply test kits for the evaluators, speech-language pathologists, and motor staff. In addition, there are other test kits available for check out. These test kits can be found in the Diagnostician/Motor wing on the 4th Floor of Central Office. When a staff member checks out a test kit, they must complete the test check out form-as well as the check in when finished. The ordering designee will use the check-out form when ordering/inventorying materials to ensure all kits are accounted for.

Ordering Materials

Twice each year (December and May) a designated evaluator, SLP, and motor staff member will check/monitor inventory (test kits, test records, therapy materials). The designee will submit the required purchase requisition to the EPO Finance Administrative Assistant for any test kits and materials that are needed. Inventory shall be monitored throughout the school year.

To order kits and materials, the designee will complete and submit a purchase requisition form to the EPO Finance Administrative Assistant. This process shall be completed by the 15th of December and May of each school year. Designee will include the test information from the

company's website, including the price and address of the company. The EPO Finance Administrative Assistant will take care of ordering the needed materials with administration approval.

MOTOR STAFF THERAPY MATERIALS and EQUIPMENT

Non-disposable therapy equipment is tracked via a checklist kept in the motor staff office. Each therapist is responsible for documenting the location of equipment, and collecting equipment at the end of the year.

Large items (walkers, wheelchairs, mats, etc) are kept in the portable, which is located in the parking lot. Smaller items are kept either in the portable or inside motor staff's office space.

If equipment is loaned out to a family, the therapist is responsible for getting a caregiver's signature acknowledging the loan agreement using the approved [FMS loan agreement form](#).

Motor staff does accept equipment donations. Motor staff is responsible for checking the quality/safety of the equipment that has been donated before distributing it. A receipt for the donation can be obtained from the Finance Administrative Assistant.

SPEECH-LANGUAGE PATHOLOGIST (SLP) MATERIALS and EQUIPMENT

SLPs have some testing kits at their school sites and will turn in an inventory list to the SLP assigned to inventory at the beginning of the new school year and then again at the end of the school year with an updated inventory list. The designated SLP Liaison handles the inventory.

SLPs will include the iPad with charger that was issued at the beginning of the school year, along with the cover and stand on the inventory list.

GENERAL EDUCATION RESPONSIBILITIES

MULTI-LAYERED SYSTEM OF SUPPORTS (MLSS)

Multi-Layered System of Supports (MLSS) is New Mexico's adaptation of the Response to Intervention Framework (RtI). MLSS is a coordinated and comprehensive framework for educators to use to organize their schools and school systems to support student learning. This support is accomplished by identifying and supporting students' learning and behavioral needs and by recognizing and providing resources to teachers, health and wellness personnel, and school administrators required for full implementation and long-term sustainability of MLSS. MLSS supports high-quality instruction and intervention, healthy students, and safe learning environments.

For more information from NMPED about MLSS click on the link: **Multi-Layered System of Supports (MLSS) 2019**

The Multi-Layered System of Support (MLSS) process must be followed prior to referring a student to special education unless a clear and obvious disability or urgent situation makes it clearly impossible, in which case, the intervention process might not need to be followed, and An “expedited” referral to determine special education eligibility may be necessary.

MULTI-LAYERED SYSTEM OF SUPPORTS (MLSS) INTERVENTIONS

Click [here](#) to view the MLSS layer descriptors/table located on pages 13-14 in the FMS *Teachers’ Guide 4 Critical Commitments*.

While MLSS provides immediate, data-informed support for students struggling academically and behaviorally, it does not preclude the initiation of the SAT process for students who may benefit from the creation of an Academic Improvement Plan (AIP) or a Behavior Intervention Plan (BIP). Under New Mexico State Statute, the AIP is a written plan required for students in grades K-8 who have been retained and those who have been promoted despite a retention recommendation. The AIP is developed by the teacher/department team.

Functional Behavior Assessment (FBA), allowing for a problem-solving process that relies on a variety of techniques and strategies to identify the purposes of the behavior or its function from the student’s perspective. This process supports school teams in the selection of interventions to address student behavior. An FBA may occur in Layer 2 or 3 of the MLSS process.

A student receiving Special Education Services is eligible to receive all appropriate support through MLSS.

SECTION 504

Section 504 covers qualified students with disabilities who attend schools receiving Federal financial assistance. To be protected under Section 504, a student must be determined to: (1) have a physical or mental impairment that substantially limits one or more major life activities; or (2) have a record of such an impairment; or (3) be regarded as having such an impairment. Section 504 requires that school districts provide a free appropriate public education (FAPE) to qualified students in their jurisdictions who have a physical or mental impairment that substantially limits one or more major life activities.

Please access the links below to complete the Section 504 process for a student who may be eligible for accommodations under a Section 504 Plan:

All Section 504 forms are completed by the school's Section 504 chair in PowerSchool Special Programs.

PARENT REQUEST FOR EVALUATION

The United States Department of Education and the Office for Civil Rights (OCR) have consistently held that a parent may submit a written request for a comprehensive evaluation at any time. The written request for a comprehensive evaluation cannot be refused based on the MLSS/SAT process not having been completed or even initiated *unless* the district “has no reason to suspect” that the student is a student with a disability. In that case, the district can refuse to conduct the evaluation but must give the parent a *Written Notice of Refusal* explaining the reasons for not conducting the evaluation. The parent must be informed that he or she may request due process to override the district's decision.

Effective July 1, 2023 - New Rule Change

- **6.31.2.10(D)(3)-(4), (6) NMAC (7/1/2023)**
- ***“The public agency shall respond to a parental request for evaluation or reevaluation to the public agency no later than 15 school days from the receipt of the request. If a parent request for an evaluation or reevaluation is received within 15 school days before the start of a scheduled period in which student attendance is not required for at least 14 calendar days, the public agency shall respond no later than 30 calendar days from the date of the request.”***
- Parents are permitted to request an initial evaluation before, during, or after the implementation of MLSS.
- Parent requests may occur orally or in writing:
 - To any licensed personnel of the school in which the student attends
 - Requests shall be forwarded to the school or district special education director or school administrator.
 - Parent requests for evaluation must be submitted to EPO using the current school year's [Parent Request / SAT Referral/ Re-Eval / Transfer form](#).
 - If the request comes directly to EPO via a phone call or email from the parent/guardian, a facilitator or EPO administrators will complete the Parent Request / SAT Referral / Re-Eval form.
 - Upon receipt of the request, the school's assigned diagnostician will reach out to the parent/guardian
 - The district has 15 school days to respond to parental requests for a special education evaluation or reevaluation.

- The school's assigned diagnostician will contact the school's SAT chair to gather additional information and data. The diagnostician will contact the parent and provide the Prior Written Notice (PWN) and Procedural Safeguards following the guidelines outlined below
- If a parent request for an evaluation or reevaluation is received within 15 school days before a school break lasting at least 14 calendar days, the public agency shall respond no later than 30 calendar dates from the date of the request.
- The district response shall be through a prior written notice and shall either:
 - Propose to conduct the evaluation or reevaluation that is requested.
 - If so, written informed consent to conduct the evaluation shall be requested
 - Refuse to conduct the evaluation that is requested
 - PWN should contain reasons for the refusal (have good reasons why you are refusing the evaluation)
 - Procedural Safeguards Notice shall be provided along with the PWN

Parents must be cautioned that if a student is being referred for a potential Specific Learning Disability (SLD), it would be difficult or impossible for the IEP Team to ultimately find the student eligible without evidence that his or her needs could not have been met in general education with the provision of supplementary aids and services (as required by IDEA).

- ❖ A SAT Referral packet must be completed in Analytics & Insights when a student is being evaluated for special education.
 - When the school is completing the SAT Referral paperwork, the school must hold a SAT Meeting, and obtain parent permission to move forward with the referral for an evaluation.
 - When a parent requests an evaluation, and the diagnostician sees the need to move forward with an evaluation based on the data available, the school will complete the SAT Referral paperwork; however, the school will not need to hold a SAT Meeting.
 - When a parent requests an evaluation, and the diagnostician does not see the need for an evaluation based on the data available, the diagnostician will reach out to the parent to have the conversation regarding the data/evaluation, and will capture the conversation in a Prior Written Notice (PWN), and provide the parent with the Procedural Safeguards.

PARENT / SAT/ RE-EVAL REFERRAL PROCESS

All parent requests for special education evaluation, SAT referrals, and Re-Eval packets will be submitted to the Exceptional Programs Office via the [Parent Request / SAT Referrals / Re-Eval template](#). Please do not use the EPO Request for Support form to send parent requests for evaluation

to EPO. Email submissions for parent requests, SAT referrals, and Re-Eval packets will not be accepted.

The EPO diagnosticians will handle all Stand Alone Prior Written Notices (PWNs) for all parent requests and school SAT referrals within 15 school days of receipt of the referral template (unless it is before summer break).

All special education Re-Eval packets will be uploaded to the referral template, which each school diagnostician will have access to. There will be no need to email re-eval packets via school email.

The EPO diagnosticians will be the point of contact for all parent requests, SAT referrals, and re-eval packets. If you are questioning where the process is at, please email your school's assigned diagnostician. If you do not receive a response, a second email will need to be sent, copying the EPO director and assistant director in the email, who will follow up with the diagnostician.

STUDENT ASSISTANCE TEAM (SAT)

Link to NMPED: MLSS Supplemental Guide for Student Assistance Team 2019

Required for All New Mexico School districts and Charter Schools per Subsection D of 6.29.1.9 NMAC

The SAT is a school-based group who provide additional educational and behavioral support to students experiencing difficulties that prevent them from progressing in core instruction. (SS22-13-6).

The SAT process is a means for collecting and reviewing data, identifying and documenting interventions and their effects, making retention determinations (SS22-2C-6), and referring students to a Multi-Disciplinary Team (MDT) for special education or gifted evaluation.

Referral to the SAT is not required for assigning a student to layered interventions as part of MLSS. Appropriate interventions should be provided to all students regardless of referral to SAT, and regardless of special education or gifted determination or potential determination. Students in the SAT process are entitled to continue to receive all appropriate Layer 1, 2, and 3 interventions.

SAT Composition

While the composition of a SAT will vary by school, each team's membership must include the following members, one of whom functions as the school's SAT chair.

- ❖ School administrator
- ❖ Teacher Grade Level/Department Team
- ❖ School counselor/SAT Chair
- ❖ Parent/Guardian

Additionally, the following persons should participate in the SAT as necessary and as available:

- ❖ Student (as appropriate)
- ❖ Instructional support providers (e.g., speech-language pathologists, school nurses, school psychologists, etc.)
- ❖ Attendance clerks
- ❖ Reading or math specialists
- ❖ McKinney-Vento homeless education coordinators
- ❖ Second-language acquisition specialists (e.g., bilingual or TESOL endorsed teachers, etc.)
- ❖ Representatives from the Children Youth and Families Department
- ❖ Representatives from community agencies (e.g., school-based health centers, community-based truancy centers, etc.)

*Note: As part of inviting outside agencies to the SAT, it is important to garner parent consent and have the agency sign a confidentiality agreement prior to participating in the SAT meeting.

*Information below was taken from NMPED's [MLSS Supplemental Guide for SAT](#).

General Education Responsibility
<p style="text-align: center;">SAT Process</p> <p>Overall timeline will vary with the nature, type, and extent of interventions implemented.</p> <p style="text-align: center;">FMS SAT Flowchart</p> <p>*Please follow Analytics & Insights SAT Referral Process to complete SAT forms.</p>
<p>STEP 1: REFERRAL TO SAT CHAIR</p> <p>If a student remains in MLSS layer 2 or 3 over a 9-12 week period, and continues to struggle without making progress with targeted interventions, SAT <u>may</u> need to be initiated by the teacher/department PLC team, with administrator approval. Gifted referrals must show enrichment interventions and the data that supports the student's growth, and will follow the same SAT referral process below.</p> <p>The SAT referral requires that the teacher/department PLC document the academic and/or behavioral interventions that have been implemented and the multiple data points demonstrating a lack of student progress over time. The teacher PLC/department teams will complete the SAT referral forms in Analytics & Insights, which includes the following</p>

General Education Responsibility

information:

- Forms for either Academic and/or Behavioral concerns
- Documentation of outcomes of attempted intervention progress monitoring (sample forms for progress monitoring can include an Intervention Plan);
- Parent/guardian communication;
- Results of universal screening (Health Screening Form) - requested by the SAT Chair or Case Manager;
- Two separate observations of the student in two different settings/two different people;
- Implementation data regarding the use of rigorous, high-quality curriculum and methodologies (Instruction or Behavior Fidelity Assurance Form).
- Documented MLSS interventions, enrichment, and data is required.

STEP 2: REFERRAL PACKET REVIEW AND CERTIFICATION

Prior to an initial SAT meeting, the building administrator and SAT chair review the SAT Referral Packet, and determine if the data meets the criteria for SAT referral. The SAT Referral packet requires that the teacher/department teams document the academic or behavioral interventions that have already been implemented and multiple data points demonstrating a lack of student progress over time.

The SAT Referral Packet must include the following:

- Academic and/or behavioral concerns
- Documentation of outcomes of attempted intervention progress monitoring (i.e. SAT Action/Intervention Plan)
- Parent/guardian communication
- Results of health screening from school nurse
- Two separate observations of the student in two different settings/two different people
- Implementation data regarding the use of rigorous, high-quality curriculum and methodologies (Fidelity Assurance Form)
- Documented MLSS interventions, enrichment, and data to show lack of progress or growth for suspected giftedness.

STEP 3: THE SAT MEETING

The SAT Chair will schedule a SAT meeting. The SAT Chair ensures the student's parents, teachers, building administration, and other SAT members are notified of the meeting in advance with a Notice of Invitation to SAT Meeting and Student Case History is sent to the parents.

STEP 4: IMPLEMENT AND MONITOR INTERVENTIONS

After the responsible individuals have implemented interventions under MLSS Layers 2 and/or 3, or the BIP, the SAT Chair schedules a follow-up SAT meeting. The student's progress should be monitored and graphed every two weeks to determine if the student is meeting goals. After appropriate data collection, and not less than once per semester after the initial SAT meeting, the follow-up SAT Meeting(s) should be scheduled to determine the effectiveness of the intervention plan and whether to continue interventions, adjust interventions, or refer for special education or gifted evaluation.

General Education Responsibility
If Disability or Giftedness is Suspected: Complete Referral Packet.



Referral Packet Submitted to Exceptional Programs Office Incomplete referral packets returned to the school campus Follow the FMS SAT Process
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Special Education Responsibility			
SAT Referral Process			
Referral Packet Accepted by Diagnostician (not the date the packet is received by EPO)	Informed Parent Consent	Initial Evaluation & Written Report	Initial IEP Meeting
No more than <u>15 school days</u> from date of acceptance to educational evaluator obtaining parent consent. <i>Parent will be provided a copy of Procedural Safeguards and PWN with acceptance or rejection of request for an evaluation. (Applies to all parent requests and district</i>	SPP Indicator 11 – No more than <u>60 calendar days</u> between the date informed consent is garnered and the date the evaluation is completed.		<i>** Must be held within <u>15 school days</u> of the final evaluation. The IEP team determines if the child is eligible for special education services.</i>

<i>initiated referrals for evaluation)</i>		
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SAT Process: Exiting SAT

Targeted SAT interventions may provide students not making expected progress with the knowledge and skills to be successful in the general curriculum. Students receiving SAT interventions are regularly assessed to determine if they should be retained or if they should be referred for special education or gifted services, or if they may be ready to exit SAT. The SAT may consider exiting a student from the SAT process if the student is no longer suspected of having a learning disability or of being gifted, and if the student will not be retained in the same grade for the following year.

SCREENING PROCESS FOR RELATED SERVICES (SAT)

Related services providers (speech/language, OT, PT, audiology, TVI, O&M) may be called upon to screen students, recommend interventions for the classroom and assist in determining if there is a need for an evaluation. The screening is not solely designed to recommend an evaluation, but to determine what classroom MLSS interventions might be appropriate and to make suggestions to classroom teachers (for speech only). ****Permission for a screening must be obtained by the related service provider from parents prior to screening.*** [Parent Consent for Initial Screening form](#) (the SLP must print this form – please do not type information on this form).

In screening students, the related service provider can include formal and informal measures. The related service provider will provide a brief written report of screening results along with other documented supportive information and possible recommendation for evaluation and/or further interventions to SAT. If an evaluation is recommended, the SLP, in conjunction with the SAT chair, completes all necessary forms and documentation in Analytics and Insights.

SPEECH ONLY (SAT) REFERRAL

If the concern is only for articulation, voice, or fluency, the SAT process will be facilitated by the SLP in conjunction with the SAT Chair. The SAT chair will open the SAT paperwork in Analytics & Insights, and the SLP will complete the required paperwork in Analytics & Insights and notify EPO via the [EPO SAT Referral form](#) for a Speech Only evaluation. The following documents are required:

- ❖ *SAT Form A - Student Profile and Background*
- ❖ *SAT Form G - Observation* is not required, unless the SLP feels it is necessary, and as long as a screening has been completed

- ❖ Attendance and historical grades - will pull from PowerSchool data
- ❖ Language Usage Survey (LUS) is found in PowerSchool
- ❖ Copy of Bilingual Information, if applicable - Special Education Referral Form (any student whose language survey indicates anything other than English), Sociocultural Scale (Native American or other 2nd language speakers), SASH-Y (Spanish Only Student)
- ❖ SAT Form D - Vision & Hearing Screening of passed, not failed vision/hearing screening
- ❖ Copy of additional medical information (if medical conditions exist, past or present)
- ❖ SAT Form C - Student Case History form completed by parent

***It is the responsibility of the SLP to obtain parental consent for speech only testing, complete the Prior Written Notice (PWN), and provide the parent with the Procedural Safeguards.** When the SLP garners parent consent, an email must be sent to the EPO records secretary with the name of the student and the date of consent to document and track the 60-day timeline,

The following documents must be opened by the SLP:

1. Draft Eligibility Determination
2. Notice of Invitation
3. Draft IEP (must be opened 10 days in advance of the IEP meeting).
4. It is required that the SLP contact the parent/guardian two (2) days prior to the scheduled IEP meeting to review the evaluation report.

The evaluation and IEP process must be completed within 60 days (date of consent to date of IEP). SLPs should also be communicating with the Diagnostician at his/her school site.

****IMPORTANT NOTE: Students who are receiving speech only services, but there are additional academic and/or behavioral concerns, the student must go through the MLSS and SAT referral process and all documents for SAT must be completed. Please follow the FMS [SAT Process](#) and [SAT Flowchart](#). *A student does not automatically qualify for special education services if they are an articulation only student. See process below "Referring a Speech Only Student to SAT Due to Additional Concerns."***

SCHEDULING THE SPEECH ONLY IEP MEETING

After the comprehensive assessment (if any other disability is being considered) or Speech-Only evaluation has been completed, the student's home school will send out a Written Notice of IEP Meeting to all participants. If a comprehensive evaluation was completed, the evaluator will collaborate with the site specialist to schedule the initial IEP meeting and send out the Written Notice of IEP Meeting. If only Speech evaluation was completed, the SLP bears that responsibility.

REFERRING A SPEECH-ONLY STUDENT TO SAT DUE TO ADDITIONAL CONCERNS

Areas that may be effectively targeted in a Speech Only IEP include but are not limited to:

- ❖ Spelling
- ❖ Phonological awareness
- ❖ Social skills
- ❖ Functional skills

If other concerns arise (academics), classroom teacher/s contact the SLP. Most common concerns are with reading, writing, ELL status, or general academic achievement. Speech Only IEPs do not target academics.

The SLP refers the Speech Only student to the Student Assistance Team (SAT) at their school due to additional concerns. For example: If the teacher expresses concerns in reading comprehension, SLD - Reading Comprehension is a separate disability category than SLI - Speech Only and will need a new SAT referral.

SLP (Case Manager) discusses academic concerns with the SAT Chair (after MLSS strategies and interventions have been exhausted) and supports the SAT process. Please see SAT procedures for more information on the appropriate SAT referral process.

SLPs may support a Speech Only student who is in MLSS/SAT for academics by:

- ❖ Communicating effectively with parents, teachers, and SAT Chair. Many times these additional concerns are brought up during Speech Only Annual IEP meetings, PLCs, or Parent/teacher conferences. It is important that parents are made aware of these additional concerns. It is also helpful if parents understand the MLSS/SAT process.
- ❖ Follow up with the teacher/s for completion of the SAT packet.
- ❖ Follow up with the SAT chair to complete documents in Unified Insights.
- ❖ Screening the student for language concerns if warranted. See Screening procedures.
- ❖ Attending SAT meeting/s to share screening results, consult, assist in the creation of a SAT plan, and/or provide ideas for interventions in the classroom.
- ❖ Participating in the decision making process.

The SAT Chair will notify their school's EPO facilitator if the decision is made to refer the student for a full, comprehensive evaluation. (See Initial Evaluation & Eligibility Determination Team Procedures).

INITIAL STUDENT ASSISTANCE TEAM (SAT) REFERRAL

The SAT Chair will complete the [SAT Referral Google form](#) to notify EPO there is a referral ready for review in Unified Insights. The EPO records secretary will "reply all" the referral has been "received and logged". The records secretary maintains the dates referrals are received on the EPO SAT Log. The records secretary will email the assigned evaluator (may be a different evaluator than is assigned to the school) to let them know the SAT referral has been logged and

ready for review. If the file is deemed to be incomplete, the evaluator will email the school and facilitator indicating what information is still needed, and include the records secretary who will log the date the file is being returned to the school. If the SAT Referral is deemed to be complete, the evaluator will inform (via email) the records secretary to record on the EPO Database, and will set the SAT documents as "Complete". The evaluator will follow evaluation processes and make appropriate referrals to related service staff as indicated by testing data and/or recommendation from speech/language screening. ***The Diagnostician is responsible for obtaining consent for testing and referring (blue-slip) the student to any applicable related service personnel.**

[NMPED - EVALUATION AND ELIGIBILITY DETERMINATION RULE NMAC 6.31.2.10](#)

SAT teams, evaluators, case managers must follow the NMPED guidance with regard to specific deadlines and requirements for various actions related to evaluations and eligibility determinations. Please use the NMAC rules and regulations below to follow appropriate timelines. Full guidance can be reviewed in the link above.

EVALUATION AND ELIGIBILITY DETERMINATION RULES AND REGULATIONS

Referral for Evaluation or Reevaluation

- ❖ The public agency has 15 school days to respond to a parental request for a special education evaluation or reevaluation.
- ❖ If the parent request for an evaluation or reevaluation is received within 15 school days before a school break lasting at least 14 calendar days, the public agency shall respond no later than 30 calendar days from the date of the request
- ❖ The public agency response shall be through a prior written notice and shall either:
 - Propose to conduct the evaluation or reevaluation that is requested
 - If so, written informed consent to conduct the evaluation or reevaluation shall be requested.
 - Refuse to conduct the evaluation or reevaluation that is requested
 - PWN should contain reasons for the refusal
 - The Procedural Safeguards Notice shall be provided along with the PWN
- ❖ If a public agency makes a referral for an evaluation or reevaluation without receiving a parent request, the public agency shall:
 - Provide a PWN to the parents proposing to conduct the evaluation or reevaluation within 15 school days of the referral.
 - The public agency shall also seek written informed consent to conduct the evaluation or reevaluation from the parent and provide the Procedural Safeguards Notice.

- If the referral for an evaluation or reevaluation is made within 15 school days before a school break lasting at least 14 calendar days, the school/district shall provide a PWN and request consent within 30 calendar days of the referral.

Timeline for Initial Evaluations and Reevaluations

The initial evaluation and written evaluation report shall be completed within 60 calendar days of receiving parental consent for evaluation.

- ❖ Exceptions still apply including:
 - Child is not produced for evaluation
 - Child enrolls in another LEA and the other LEA is making sufficient progress toward evaluation
- ❖ Reevaluations shall be conducted at least every 3 years unless the parent and LEA agree that a reevaluation is not necessary.

Evaluations and Reevaluations

- ❖ Evaluations must:
 - be in all areas of suspected disability;
 - sufficiently comprehensive to identify all of the child's special education and related services needs.
 - Not use any single measure or assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child;
 - use technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors.
 - Evaluations and Reevaluations shall adhere to all Department rules and standards set forth in the NM TEAMS manual.

Eligibility Determination Timeline

- ❖ The evaluation report shall be provided to the parent at least 2 calendar days prior to the EDT meeting.
 - EDT meeting shall be held within 15 school days of the completion of the evaluation report.
 - If the evaluation report is completed during a break of at least 14 calendar days, then the public agency is required to hold an EDT and IEP meeting within 15 school days after the students return to school.
 - These meetings do not necessarily have to be held together
- ❖ *It is the practice and expectation of the Exceptional Programs Office to complete the initial evaluation process from the date of parent consent to IEP meeting to be a total of 60 days to*

ensure the 60 day timeline is not missed. If the IEP meeting is not held within the 60 days, the rules as outlined in NMAC 6.31.2.10 must be followed to ensure the special education services the student is entitled to receive is being provided—the IEP meeting is required to be held within 15 school days of the completion of the report. All other district policies shall be followed as indicated below.

REQUIREMENTS FOR INITIAL EVALUATION

- ❖ Before any initial evaluation may begin, the assigned evaluator must garner informed written consent (using the Parent Consent for Ed. evaluation, explanation of procedural safeguards [parent rights], and Prior Written Notice) from the parent(s). ***NOTE:** Consent to evaluation is separate from consent for initial placement.
- ❖ A full and complete evaluation must be completed within forty-five (45) calendar days of receiving parental consent for the evaluation but does not begin until Parent consent for Ed. Evaluation document is signed.
- ❖ If the parent refuses to consent or fails to respond to a request for consent, the district has no further obligation. However, there should be clear documentation of the district's efforts to obtain consent, including copies of correspondence or documentation of attempts at contact made to the parent. If the parent does not respond to contact attempts, a certified letter may be sent to the parent advising that (1) his or her non-response or refusal to consent is considered a refusal of services; and (2) the child will not be considered a student with a disability for any disciplinary or educational purposes. If the parent signs consent but does not produce the child for evaluation, the same procedures apply.
- ❖ The evaluation/assessment must be full and comprehensive including all academic areas as well as:
 - Assess in all areas of suspected disability (including health and development) including vision and hearing;
 - Use evaluation tools that are not racially, culturally, or linguistically discriminatory;
 - Be administered in the language or form most likely to yield accurate information regarding what the student knows and can do academically, developmentally, and functionally;
 - Select assessment tools that assess specific areas of educational need;
 - Ensure there are a variety of tools and strategies are used to gather relevant functional and development information;
 - Include information provided by the parent as well as information from the school staff on how the student is involved in and progressing in the general curriculum.

- Identify any accommodations in test administration that may be necessary.
 - An Eligibility Determination form must be completed and reviewed at the EDT meeting for all eligibilities that were considered during the evaluation(s).
- ❖ Assessments/evaluations must be administered by qualified personnel as specified in the instructions provided by the producers of the assessment tool.

INITIAL EVALUATION PROCESS

- ❖ Upon completing the file review and informing any other providers who may be impacted (speech, psych, etc.) the evaluator will garner consent via digital signature or physical signature (link to consent procedures). *See procedure for [Obtaining Parent Consent](#).
 - Diagnostician/Evaluator must finalize Parent Consent prior to sending the document for digital signature.
- ❖ Within one business day of garnering consent, the evaluator or SLP will immediately enter the date of consent under Initial Special Education Eligibility Dates in PowerSchool Special Programs.
- ❖ Once the assigned evaluator enters the date of signed consent on their log they will monitor the 45 day and 60 day timeline for compliance. The evaluator(s) and the team have 60 days from the date of signed consent to complete the evaluation and hold the eligibility meeting. The IEP meeting must be held within 15 school days of completing the evaluation report.
- ❖ The EPO evaluation coordinator will update weekly logs every Monday morning and share them with evaluators.
- ❖ The evaluator tracks progress on the weekly log of initial testing and EDT within the state and federally required 60 day timeline. These logs are shared with the EPO director, assistant director, and evaluation coordinator to monitor and track.
- ❖ Once an evaluator obtains written consent, the diagnostician begins the evaluation of the student and notifies related services if additional evaluation(s) are recommended, as follows:
 - For behavioral concerns, review the file with a school psychologist before garnering consent.
 - For possible speech, notify the SLP before garnering consent. It's possible the student has already been screened; it also gives the SLP notice that a referral may be coming.
 - For possible social work, refer to social work procedures.
 - For possible ASD, refer to the evaluator assigned to ASD evaluations.

★ **Reminder: District Policy is to follow evaluation procedures outlined in the [NM TEAM](#).**

- ❖ All evaluation reports will be uploaded into PowerSchool Special Programs within three (3) days of completing the evaluation and immediately open draft EDT documents on all eligibilities considered. The draft report is required to be uploaded to PowerSchool Special Programs within ten (10) days prior to the scheduled IEP meeting. The expectation of a “draft report” is, for the most part, complete and ready to be finalized. The report is in “draft” status in PSSP in case there are minor adjustments that need to be made. The report must be provided to the parent/guardian within two (2) days of the scheduled IEP meeting. The report is finalized by the evaluator after it is reviewed at the IEP meeting.
- ❖ If the student qualifies, the evaluator will contact the school’s site specialist by email to assign a case manager. The case manager or site specialist will schedule an IEP meeting with required participants.
- ❖ Once the draft EDT(s) are open, the evaluator will email the case manager to open the draft Notice of Invitation and draft IEP as soon as the evaluation is complete the draft EDT is opened.
- ❖ If the student does not qualify (DNQ), the above step will still be required; however, the student will be referred back to the SAT process at the meeting after discussing the evaluation results.
- ❖ The IEP meeting must be scheduled and held within the 60 days of garnering parent consent to determine eligibility, or not later than 15 school days of the completion of the evaluation report. The evaluator will follow up with the site specialist within five (5) school days to ensure the meeting has been scheduled.
- ❖ Prior to the IEP meeting, ensure that all email addresses for parent(s)/guardian(s) are correct on the student profile page in PSSP. At the end of the IEP meeting, ensure all information is correct, finalize the IEP, and submit the document to digital signature for meeting participants’ signature.
- ❖ The case manager will provide instructions to the meeting participants to navigate through each page of the IEP in order for their signatures to be valid on the meeting participant page. The case manager will monitor that all signatures have been garnered by meeting participants, and will accept signatures of all signatures within 24 hours of the IEP meeting. All reminders that are sent to request signatures must be documented in the Events log of the document in PSSP.
- ❖ The evaluator will finalize all EDT(s) and send for digital signatures to all meeting participants. The evaluator will monitor that all signatures have been garnered by

meeting participants, and will contact by phone and/or send (3) reminders to garner all signatures. All reminders must be documented in the Events log of the document in PSSP.

- ❖ Within one business day (24 hours) after the initial/annual IEP or DNQ meeting, the evaluator will complete the appropriate IEP Update Template. The EPO administrative assistant will add the student to the 20 day report for case managers' caseloads, and all relevant information needed for reporting purposes in PowerSchool. See EPO NOVA Administrative Assistant Procedures for procedures to enter information into PowerSchool. *Note: The EPO NOVA Administrative Assistant enters all information into PowerSchool.

INITIAL/ANNUAL IEP PROCESS

- ❖ **DEVELOPING QUALITY IEPs (added 12/04/2025)**

- Technical Assistant Manual, Office of Special Education

- ❖ **INITIAL ELIGIBILITY IEP**

- After evaluation(s) have been completed and the report(s) are written, the evaluator will upload the draft evaluation report to Special Programs. This report is considered the final report, but there may be adjustments, so it is left in draft until it is reviewed at the IEP meeting. The evaluator will finalize the evaluation report after it is reviewed with the IEP team.
 - The evaluator must provide the draft evaluation report to the parent for their review two days prior to the scheduled IEP meeting.
- The evaluator will draft the EDT document(s) for all eligibilities being considered.
- The evaluator will contact the case manager and/or site specialist when the report is uploaded, which signals the case manager to begin scheduling the IEP meeting.
- The case manager will create the Notice of Invitation and contact the parent/guardian to schedule the IEP meeting. Ensure the contact information for the parent is correct (name, address, phone, email address) at the time of the phone call.
 - The IEP Meeting must be scheduled at a mutually agreed upon time with the parent/guardian.
 - If changes to parent contact information need to be made, official changes need to go through the school secretary/registrar to update in PowerSchool.
- Once the Notice of Invitation is complete, finalize the document, and send it to the parent/guardian for signature via email/digital signature in Special Programs.
 - The Notice of Invitation must also be sent to the student, if the student is 14 years of age or older.
- Create the draft IEP in PowerSchool Special Programs.

- The case manager will schedule the IEP Meeting within 15 school days of the completion of the evaluation report.
- The draft IEP must be opened 10 days prior to the IEP meeting to allow all case managers and related service providers sufficient time to enter information, draft specific goals based on the students' needs prior to the IEP meeting.
- The Service Schedule will be drafted at the IEP meeting through discussion with the IEP Team, including parents, regarding the specific specialized instruction including related service (SLP, OT, PT, SW, Audiology, Nursing), and the amount of support that is needed based on the student's eligibility(-ies), and strengths and weaknesses to meet his/her IEP goals in their least restrictive environment.
- If a student qualifies to receive related services (Speech, OT, PT, Audiology, Nursing), complete the Medicaid and Ordering & Referring Provider sections of the Progress Documentation, Signature page of the IEP.
- At the end of the IEP Meeting, ensure that all meeting participants are listed on the Meeting Participant page, and all email addresses are correct.
- Signatures of all meeting participants are required. Signatures can be obtained using sign now and/or requesting digital signature via email.
 - Ensure all meeting participants are listed in the Prior Written Notice (PWN) page of the IEP.
 - Assist parents through the signing process using sign now or email digital signature before the meeting is concluded.
 - If any person is opted out from signing (i.e. physician), signatures must be accepted in the digital signature details in Special Programs 24 hours after the IEP meeting.
 - The signature of at least one parent is required for an initial IEP for Consent for Services.
 - If parent is unable to sign electronically, ensure the following pages are signed, and uploaded as a file-based document (labeled as signature pages) in PowerSchool Special Programs:
 - Notice of Invitation, including student if age 14 or older
 - Progress Documentation, Signature page
 - Consent for Services
 - Meeting Participant page
 - Primary Care Provider Notification (PCPN) page must be uploaded as a separate document in PowerSchool Special Programs.
 - The Medicaid One Time Consent form must be printed and physically signed at the meeting, and uploaded as a separate document in PowerSchool Special Programs.

❖ ANNUAL IEP MEETING

- Case managers must monitor Annual IEP due dates in PowerSchool Special Programs using the Annual IEP Monitoring Report.
- Work on scheduling Annual IEP meetings 30 days in advance to ensure the annual date is met in case of scheduling conflicts with the IEP Team, including parents.
- The case manager will create the Notice of Invitation and contact the parent/guardian to schedule the IEP meeting. Ensure the contact information for the parent is correct (name, address, phone, email address) at the time of the phone call.
 - The IEP Meeting must be scheduled at a mutually agreed upon time with the parent/guardian.
 - If changes to parent contact information need to be made, official changes need to go through the school secretary/registrar to update in PowerSchool.
- Once the Invitation is complete, finalize the document, and send it to the parent/guardian for signature via email/digital signature in Special Programs.
 - The Notice of Invitation must also be sent to the student, if the student is 14 years of age or older.
- Create the draft IEP in PowerSchool Special Programs.
- The draft IEP must be opened 10 days prior to the IEP meeting to allow all case managers and related service providers sufficient time to enter information, draft specific goals based on the students' needs prior to the IEP meeting.
- The Service Schedule will be drafted at the IEP meeting through discussion with the IEP Team, including parents, regarding the specific specialized instruction including related service (SLP, OT, PT, SW, Audiology, Nursing), and the amount of support that is needed based on the student's eligibility(-ies), and strengths and weaknesses to meet his/her IEP goals in their least restrictive environment.
 - Do not copy and paste goals, accommodations, and service schedules from the previous year. These must be updated annually to meet the needs of the student to progress and meet goals in light of their circumstances.
 - Accommodations should not be listed "in case". Accommodations are based on student need, not want.
- If a student qualifies to receive related services (Speech, OT, PT, Audiology, Nursing), complete the Medicaid and Ordering & Referring Provider sections of the Progress Documentation, Signature page of the IEP.
- At the end of the IEP Meeting, ensure that all meeting participants are listed on the Meeting Participant page, and email addresses are correct.
- Signatures of all meeting participants are required. Signatures can be obtained using sign now and/or requesting digital signature via email.

- Ensure all meeting participants are listed in the Prior Written Notice (PWN) page of the IEP.
- Assist parents through the signing process using sign now or email digital signature before the meeting is concluded.
- If any person is opted out from signing (i.e. physician), signatures must be accepted in the digital signature details in Special Programs 24 hours after the IEP meeting.
- If parent is unable to sign electronically, ensure the following pages are printed, signed, and uploaded as a file-based document in PowerSchool Special Programs:
 - Notice of Invitation, including students if age 14 or older
 - Progress Documentation, Signature page
 - Consent for Services
 - Meeting Participant page
- Primary Care Provider Notification (PCPN) page must be uploaded as a separate document in PowerSchool Special Programs.
- The Medicaid One Time Consent form must be printed and physically signed at the meeting, and uploaded as a separate document in PowerSchool Special Programs.

IEP ANNUAL MEETING COMPLIANCE 3/15 RULE

In order to meet compliance deadlines:

- ❖ The regulation states, if we invite a parent, and the clerk fills out the Invitation while they're on the phone, the parent signs the Invitation, and the parent does not show up, you can have the meeting without them.
 - If a parent says in a phone call to go ahead and have the meeting without them, note the consent in Events (process below) and send the Notice to the parent via digital signature immediately.
- ❖ If they sign the invitation, but call to reschedule then you need to reschedule.
 - The first time parents reschedule, document on the Invitation and the parent was notified of an impending deadline. Let them know the meeting has to be held by a particular date, and if they have to reschedule again or don't show up, then the meeting will be held without them. A revision meeting can be scheduled at a later date.
- ❖ Over the course of 15 days, a phone call can be made; an email be sent; and, the invitation can be sent via digital signature, which will count as three different ways to notify the parent of the meeting. Show at least two different types of effort, and three efforts over the 15 days. If you don't get a kicked back email, we assume the email went through.
Example: Email 15 days before the meeting, phone call 10 days before the meeting, email

5 days before the meeting, a phone call the day of the meeting. If that parent doesn't show up, you can have the meeting. This information does not need to be in the PWN, but you can say the meeting was held without the parent, as documented in the Notice of Invitation.

- ❖ You do not have to re-notify/reschedule the meeting three times for a parent no-show.
- ❖ If the parent keeps rescheduling - only reschedule once if you are up against a timeline. Don't be held hostage and then hold the meeting late. You can go ahead and hold the meeting, and tell the parent meeting is being held without them, and tell the parent we can meet and hold a Revision meeting.
- ❖ The State rule is a 10-day Notification, so if the parent signs the Notice of Invitation at the Meeting, the Notice must be dated 10 days prior to the meeting date. It is an issue if the Notice is dated for the same date as the meeting.

NOTICE OF INVITATION PROCESS

To complete the above 3/15 Rule on the Notice of Invitation, follow the process below:

- ❖ Open a Notice of Invitation, and contact the parent/guardian to schedule the IEP meeting. Once the Invitation is completed, finalize the document, and send it to the parent/guardian for signature via email/digital signature in Special Programs.
 - The Notice of Invitation must also be sent to the student, if the student is 14 years of age and up.
- ❖ To document the three types of contact with the parent/guardian over the 15 days, click on the Finalized Invitation to Ed. Program Mtg. document, click on Navigate To, Click on Events for This Document, Click on Add Event For This Document.
- ❖ To add documentation of how a parent was contacted, click on the down arrow in Link to Section, and click on Invitation to Ed. Program Mtg.
- ❖ In the Event Description, type how the parent was contacted.
- ❖ Click on Accept.
- ❖ Adding this Event will replace the documentation that was previously kept at the bottom of the Notice of Invitation when it was in Review.
- ❖ If a parent/guardian needs to reschedule the meeting, a new Notice of Invitation will be opened and labeled 2nd Notice.

PROCEDURE FOR INITIAL DNQ (not an exit IEP):

After evaluation is completed and report is written, the evaluator will draft the EDT document(s) for all eligibilities being considered.

At the EDT meeting, the site specialist will keep a stand-alone PWN, capturing the proposals made and decided upon and garnering signatures of the meeting participants via electronic signature.

- ❖ Always have one proposal that the student is eligible for services under *category* and requires specially designed instruction—if rejected, identify the data that determines this. NOTE: a student may qualify as a student with a disability but not show a need for specially designed instruction

A student must meet the criteria AND show a need for specially designed instruction—this is not an OR situation.

If the team determines the child is eligible for services, an IEP must be constructed and held within 10 days of the EDT meeting.

OBTAINING PARENT INFORMED WRITTEN CONSENT

- ❖ The Evaluator (evaluator or related service provider) will contact parent/guardian via phone or email to inform them of the 60-day timeline, and explain parental consent for testing and procedural safeguards. If the parent agrees to the evaluation, the evaluator sends to the parent (via digital signature) the following documents found in PowerSchool Special Programs (PSSP): Parent Consent for Ed. Evaluation and Prior Written Notice (PWN) for signature. If the parent is physically present, the evaluator may garner physical signatures.
- ❖ Give the parent a copy of the completed consent form, PWN, and a copy of Parent and Child Rights in Special Education (procedural safeguards).

CONSENT FOR WARDS OF THE STATE OR NO PARENT IS FOUND

If a student is a ward of the state, the district must make reasonable efforts to gain consent from the parent (maintain documentation of all such efforts), except where the parent's whereabouts cannot be determined despite reasonable efforts, or where the rights of the parent have been terminated or modified and consent is received from a judicially appointed representative. In these situations, unless the court has appointed an individual with educational decision-making authority, the district is responsible for assigning a surrogate parent. A list of trained surrogates is available by clicking [here](#).

CONSENT FOR STUDENTS WHO ARE OF AGE OF MAJORITY

Students who have reached the age of 18 are considered adults in the State of New Mexico. The evaluator will obtain permission to test from the student unless guardianship is in place.

EVALUATION DESCRIPTIONS

The evaluation descriptions listed below are typically used in an assessment of a student's abilities. The list does not include every type of test that may be used. All those listed may not be used. The evaluator will select tests that are best for the student's age, grade and abilities. Information regarding the evaluation will be shared at a Multidisciplinary Team meeting.

ACHIEVEMENT – an assessment of the student's current academic functioning level. Assessment areas may include oral expression, listening comprehension, written expression, basic reading skills reading comprehension, mathematics calculation and mathematics reasoning

ASSISTIVE TECHNOLOGY – an evaluation of the technology needs of the individual, including a functional evaluation in the individual's environment. An assistive technology device is "any item, piece of equipment, or product system ... that is used to increase, maintain, or improve functional capabilities of individuals with disabilities." [§ 300.5; authority 20 U.S.C.1401 (1)]

AUDIOLOGY – a comprehensive hearing evaluation to determine the nature and degree of hearing loss.

INTELLIGENCE – an individually administered assessment of general intelligence. These instruments measure different abilities, such as comprehension, visual and auditory perception, visual and auditory memory, vocabulary, etc.

MOTOR – these assessments document the student's overall ability to perform basic tasks and activities requiring fine and/or gross motor skills in educational settings. Students may be asked to walk, run, sit, or perform other educationally appropriate physical activities.

ORIENTATION AND MOBILITY – an assessment for children with visual impairments in order to determine the extent of services needed to travel safely and as independently as possible in the environment.

OTHER – other assessments may be required in order to gain a more complete picture of the student.

PSYCHOLOGICAL – these evaluations may include projective, self-concept and/or personality measures which may be administered by a psychologist.

SOCIAL/BEHAVIORAL – these instruments/observations document the student's ability to act and interact appropriately in everyday situations within the school, community and family. Such instruments may include checklists, observation(s) in the classroom or other educational settings, and parent and/or teacher interviews as well as paper/pencil tasks for the student.

SOCIAL WORK – these assessments evaluate the student's ability to act and interact in a classroom/school setting and to help identify conditions that may interfere with a student's learning process. These assessments may include interviews with the student, parent, community mental health or medical providers as well as classroom observations, teacher interviews, and a student records review. Depression, anxiety and self-esteem inventories may also be utilized to gather information.

SPEECH/LANGUAGE – an assessment of the student's articulation, language, fluency, voice and adequacy of the oral mechanism. Non-verbal students will be assessed with alternative communication systems, as appropriate. Medical referrals may be appropriate for some students.

VISION AND HEARING – screenings to determine the student’s visual and hearing acuity will be conducted prior to consent for formal assessment. Medical referral(s) may be necessary. If visual/hearing problems are present following medical intervention, formal evaluation may be postponed until corrected. If correction is not possible, non-discriminatory assessments will be selected when the student is evaluated.

VOCATIONAL – such instruments assess student areas of interest and skill for future planning and educational development.

CROSS REFERRALS - (INTER-OFFICE REFERRALS)

Diagnosticians may refer students for further testing in the areas of Speech/Language, Motor, Psychological, Audiological, Social Work, O&M, etc.

- ❖ Diagnostician will complete the Electronic Inter-Office Referral form ([Blue Slip](#)) sending notification to the records secretary
- ❖ Attach consent, case history, and any other necessary information/additional documentation
- ❖ The student’s electronic file is kept by the evaluator until the support evaluation(s) are completed and received
- ❖ Once the evaluator receives the support evaluation(s), he/she:
 - Completes the Psychoeducational Report to include a summary of any support evaluations
 - Completes Eligibility Determination Form(s) for all disabilities being considered
 - Contact site specialist or case manager, (if student qualifies); or Student Assistance Team Chairperson (if DNQ) to set up EDT/IEP meeting.

★ **NOTE:** *Referrals to related service staff need to be completed at the beginning of the evaluation process as soon as written permission is received.*

PRESCHOOL INITIAL EVALUATION

PART C TO PART B

- ❖ Roundtree (Early Intervention Services: birth to three year olds) and preschool administration will set up a transition meeting for children transitioning from Early Intervention before 90 days of a student’s third birthday when they become preschool age.
- ❖ The evaluator will collect and maintain documentation and schedule necessary procedures (eg. hearing/vision screenings, evaluation date/time).
- ❖ The evaluator garners informed consent prior to or upon initiation of evaluation process (including related services, if applicable).

- ❖ Once evaluations are completed, the related service staff (when applicable) will complete either an individual evaluation report or add to the evaluator's evaluation report and add information to the EDT document(s).
- ❖ The evaluator will notify the school to schedule a meeting to discuss results and recommendations for eligibility for special education services.
- ❖ The school will schedule the meeting and invite all appropriate participants.

PRESCHOOL CHILD FIND

- ❖ Preschool screening staff conduct screenings on scheduled dates over various developmental areas. Screening results determine the need for further evaluation. Administration sends the complete file to the evaluator unless concerns are articulation only; then file goes directly to the SLP, and the SLP garners consent and completes the evaluation.
- ❖ The evaluator collects and maintains documentation and schedules necessary procedures (eg. hearing/vision screenings, evaluation date/time).
- ❖ The evaluator garners informed consent prior to or upon initiation of the evaluation process (including related services, if applicable). *See procedure for [Obtaining Parent Consent](#).
- ❖ Once evaluations are completed, the related service staff (when applicable) complete either an individual evaluation report or add to the evaluator's evaluation report and add information to the EDT document(s).
- ❖ The evaluator notifies the school to schedule a meeting to discuss results and recommendations for eligibility for special education services.
- ❖ The school schedules the meeting and invites all appropriate participants.

SPEECH LANGUAGE TESTING PROCEDURES

Speech language evaluations may include assessment of the student's articulation, language, fluency, voice and/or oral motor function. Additionally, the SLP may assess pragmatic/social-cognitive aspects of language use. Students with limited verbal skills may be assessed with alternative communication systems as appropriate. Medical referrals may be appropriate for some students (i.e. Voice Referral). **Bilingual students--add procedures**

The SLP administers standardized speech language tests. Composite or total scores should be used when considering eligibility, rather than individual subtest scores. Sometimes it is appropriate to administer a standardized test to a student who exceeds the age of the normed population. In this case, only descriptive information about results should be reported. Standard scores and percentiles should not be reported. Age equivalent scores are generally not reported and should not be used to diagnose language deficits. Criteria recommended by individual test authors should be followed in determining the presence and severity of a language deficit. **A**

discrepancy of at least 2.0 Standard Deviations (SD) below the mean (severe range) is needed for initial eligibility. Scores must fall below SS of 70. Evaluators must follow procedures as defined in the NM TEAM.

OT AND PT TESTING PROCEDURES

Occupational therapy evaluations include assessment of the student's fine motor skills, and physical therapy evaluations include assessment of the student's gross motor skills as related to participation in the classroom curriculum. Sensory processing information must be included when considering autism spectrum disorder, and may be included when considering other eligibilities, if it is relevant to classroom performance. Standardized assessments may or may not be appropriate, depending on the student's cognitive and language abilities. If standardized measures are used, composite or total scores should be used when considering eligibility, rather than individual subtest scores. Sometimes it is appropriate to administer a standardized test to a student who exceeds the age of the normed population. In this case, only descriptive information about results should be reported. Standard scores and percentiles should not be reported. Criteria recommended by individual test authors should be followed in determining the presence and severity of a fine motor deficit. Standardized measures are used to guide a therapist's clinical decision making, and should be taken into consideration along with input from the IEP team when determining the need for services in the school setting. Evaluators must follow procedures as defined in the NM TEAM.

VI AND O&M PROCEDURES

❖ Definition of Visual Impairment

A visual impairment, including blindness, means an impairment in vision that, even with correction, adversely affects a child's educational performance. The term includes both partial sight and blindness.

❖ Comprehensive Vision Evaluation

The teacher of students with visual impairments (TSVI) conducts Functional Vision Evaluations (FVE) and Learning Media Assessments (LMA) which include an assessment of the student's visual skills, as related to participation in the classroom curriculum. A variety of assessments and Standardized measures are used to guide the TSVI's clinical decision making, and should be taken into consideration along with input from the IEP team when determining the need for services in the school setting. Evaluators must follow procedures as defined in the NM TEAM. The FVE and LMA will inform the parents and the teachers the best way the student learns and what type of accommodations and modifications are needed to be made.

❖ Vision Equipment and Materials

The FMS TSVI maintains materials and resources to provide to classroom teachers for their visually impaired students. Materials can be requested through the TSVI. In addition to

vision-specific tactile classroom materials, the TSVI is able to braille a variety of materials such as grids, graphs, and math assignments. Talking calculators, software and apps are also available.

❖ **Referring a visually impaired student to SAT**

Commonly asked questions:

- ❖ *A new student to the district is enrolling in school, and has an obvious visual impairment, does the SAT process begin?*

It depends on the severity of the visual impairment. If there is a suspicion of a disability, request a vision screening/report from the school nurse. Send results directly to the TSVI. This will give the TSVI enough information to determine the need to consider the SAT process or move forward with testing if it is an obvious condition.

- ❖ *My student wears glasses, does that mean they qualify for services?*

No. The visual impairment must affect the child's educational performance. If it is noticed that even with glasses the student holds papers close to their face, squints frequently, complains that they can't see the board, trips and falls frequently, and/or shows some behavior issues you will want to speak to the SAT team and start observations. Request a vision screening/report from the school nurse.

- ❖ *How do I know if I need to begin the SAT process on a potential VI student?*

Use the [VI Flow Chart](#) to answer the questions and that will help you know what steps to take.

AUDIOLOGY PROCEDURES

❖ **Comprehensive Audiological Evaluation**

Comprehensive audiological evaluations may include air/bone pure tone testing, tympanometry, speech testing, and/or otoacoustic emissions testing to determine the presence of a hearing loss and the extent to which it may affect a student's ability to learn in various school settings.

Medical referrals to a range of specialty providers (e.g., ear nose and throat physician) may be warranted based on the outcomes of these assessments.

Such testing is ideally (but not always possible to be) completed in a sound treated-environment such as with the aid of an audio booth in order to decrease unnecessary over referral to our medical community. When considering eligibility for Hearing Impairment, including Deafness exceptionality in New Mexico, educational impact is taken into consideration in addition to the nature and degree of the student's reduced hearing. Educational impact is measured by a combination of data such as: hearing levels, listening in noise performance, student observations, teacher and parent/guardian's input, achievement scores,

speech and language outcomes, professional judgment, and psychoeducational data (please refer to the NM technical manual and other useful texts written specifically for New Mexico specialized instruction at [Technical Manuals – New Mexico Public Education Department](#)). Together, an informed team decision can be reached as to whether an IEP or Section 504 Plan should be utilized for the D/deaf and hard of hearing student.

❖ **Auditory Processing Evaluation**

At times, a student's teacher or family may have concerns for his/her processing of auditory information, and testing will be requested to evaluate for an auditory processing deficit (APD). These deficits may first appear via psychoeducational testing and/or speech/language testing. When in-depth, specialized auditory processing testing is completed and an auditory processing disorder is identified, a profile for the student with APD can then be created to better guide management, accommodations, and/or interventions needed to assist the student with APD. Because APD can mimic or overlap with common behaviors seen in students with Speech and Language Impairments and/or AD(H)D, students with normal hearing, normal IQ, good English proficiency, and being at least eight years of age are typically referred and tested for an APD. However, an exception can be made for a student with mild hearing loss for whom some APD tests are normed on such populations. Once a profile is established for a student with an APD that will describe his/her typical struggles, classroom accommodations and/or assistive technology may be recommended for the student with an APD.

❖ **Audiology Materials and Equipment**

The FMS audiologist maintains testing materials necessary for screening, diagnostic and functional testing. Materials are typically requested through the SLP materials/protocols procurement process (contact the lead SLP or designee for time-sensitive information regarding ordering materials for the current and/or upcoming school year). In addition to hearing-specific materials such as speech in noise testing, auditory processing evaluation materials for children and adolescents may be ordered, as needed.

Equipment for testing purposes within FMS includes a diagnostic audiometer, tympanometer, and electroacoustic hearing aid analyzer. Non-mobile testing equipment is kept with the audio booth (which will be located at the central office). All testing equipment is calibrated at least annually to comply with state law and manufacturer's recommendations.

Equipment for students who are D/deaf or hard of hearing may include remote microphone devices (also known as FM devices), classroom audio distribution systems, and desktop speakers. These pieces are inventoried at the beginning and end of school years by the FMS audiologist. Equipment not currently being used is housed at the central office.

SCHOOL PSYCHOLOGY/SOCIAL WORK PROCEDURES

❖ Social Work Procedures

ASSISTIVE TECHNOLOGY PROCEDURES

According to federal IDEA regulations, “*Assistive technology device means any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of a child with a disability. The term does not include a medical device that is surgically implanted, or the replacement of such device.*” Assistive technology (AT) can be applicable to students across diverse areas of need (i.e., speech, audiology, gross/fine motor, etc.). The process for acquisition of AT for FMS students in special education is generally uniform across disciplines. The process includes at least two critical parts: 1) data to support the use of AT for a child with an IEP *and* documentation for its use in the IEP and 2) final approval from FMS EPO director or her/his designee. Traditional evaluations that are administered to qualify a student for special education and/or related services may already include testing that evaluates whether or not AT is warranted for a particular student. However, AT-specific evaluations in addition to the initial/reevaluation eligibility testing may be necessary in order to demonstrate the need for AT. For example, an augmentative and alternative communication (AAC) device may be recommended after deficits in expressive communication have been identified via speech/language testing. Since an ability (intact fine motor) to use an AAC device properly is a concern for this particular AT device, evaluations and determination for AT may also include input (e.g., additional testing) from the occupational therapist. As a similar example, a classroom audio distribution system may be warranted for a student based on basic hearing measures or more specialized testing to demonstrate the benefit of such AT. Once data has been collected that show a need for a particular AT device, the service provider making the AT device recommendation will work with EPO to determine the best product to use for the target student. With the final approval of the director of EPO (or her/his designee), the appropriate paperwork will be filled out and the AT will then be ordered. Once delivered to FMS, the service provider will be notified by EPO. Inventory (both placing the AT device into use and storage aspects of the AT device) will be the responsibility of the related service provider(s) who recommended the AT device. *Important note: any use of AT should be explicitly written into the IEP (Special factors page, Instructional Accommodations or Modifications, Addendum for Students who are deaf or hard of hearing, Schedule of Services page(s), and the PWN, as needed in each individual circumstance). Adding the AT device into the IEP may necessitate an addendum meeting to amend the most current IEP. In addition, no product by specific name/manufacture shall be included in describing the type and proper use of AT. Rather, a brief description of the AT’s function or category of AT device may be used.*

EVALUATION REPORT EXPECTATIONS

All evaluation reports are to be written in a parent friendly manner and not include any subjective personal assumptions regarding the student. ***State factual information only.***

- ❖ Each evaluator (or group of evaluators if producing a single report) is required to produce a formal report to include the following:
 - Student Demographics
 - Date(s) of Evaluation(s) must be included on the Final Evaluation Report. The final date of the evaluation report is the **Most Recent Evaluation Date** and **Initial Evaluation Completion Date**. The evaluator is required to enter the appropriate dates and information regarding eligibility in the student's Profile → Special Education Placement page in PowerSchool Special Programs. The information entered on this page will flow into the Student Demographics page of the IEP.
 - The IEP meeting must be held within 15 school days of the completion of the evaluation report.
 - Referral and Background Information
 - List of Assessments
 - Classroom Performance/Teacher Input
 - Statement regarding Academic Impact
 - Recommendations (for school staff, parents, and/or SLP, OT, PT)
 - Statement of Eligibility(ies) to address whether or not there is evidence of a significant deficit with an academic impact (****Note:** every statement of eligibility needs to have an EDT document completed)
- ❖ Additional Areas that might be included as appropriate:
 - Medical/Developmental History
 - Independent/Outside Agency Testing
 - Historical grades, state/district test scores
- ❖ Eligibility Determination Timeline
 - The evaluation report shall be provided to the parent at least two (2) calendar days prior to the EDT meeting
 - The EDT meeting shall be held within 15 school days of the completion of the evaluation report. FMS holds both the EDT/IEP meeting on the same day.
 - If the evaluation report is completed during a break of at least 14 calendar days, then the public agency is required to hold an EDT and IEP meeting within 15 school days after the students return to school.
- ❖ Evaluation report upload to PowerSchool Special Programs (PSSP):

- Upload completed report and set to “Review” status in PSSP (The report must be completed with the exception of related service input, if needed) 10 days prior to scheduled IEP meeting
- At the conclusion of the IEP meeting, upload the final evaluation report to PSSP that was presented at the IEP meeting, and set the document to “Final” status, which creates a PDF of the report

RE-EVALUATION & REED PROCESS

IDEA and NMPED require that the IEP team re-evaluate a student’s eligibility for services every three years. The REED process is used to determine if formal testing is necessary or if current data is sufficient to demonstrate that the student continues to qualify without formal testing. The student’s case manager initiates the 3-year re-evaluation process four months ahead of the due date by submitting an electronic re-evaluation packet to their evaluator and the EPO records secretary. The evaluator reviews the packet, which includes current information regarding the student, reviews the last time the student was formally evaluated, then determines next steps. The re-evaluation must be completed by the three year re-evaluation due date, not by the 60-day due date of garnering parent consent, if additional testing is necessary.

Generally, the purposes of a re-evaluation are to determine:

- ❖ Whether the student continues to be a child with a disability and continues to require the provision of special education services and/or related services;
- ❖ Whether the student may have an additional or different disability; and
- ❖ Whether the student’s current special education and related services are appropriate.
- ❖ Considerations for reevaluation:
 - Reevaluation process is triggered when the district determines that the student’s educational needs, including performance, warrant a re-evaluation; or the parent or teacher requests a re-evaluation.
 - Reevaluations shall be performed
 - Not more frequently than once a year unless the parent **and** the district agree.
 - At least once every three (3) years, unless the parent **and** the district agree that one is not necessary.
 - Updated testing should be considered at least every six years unless the IEP team determines otherwise.

The determination to conduct or not conduct a re-evaluation that includes updated assessments must be made by the IEP team. This should be done at the annual IEP meeting prior to the time the triennial evaluation is due. In order to determine the scope of the re-evaluation, the IEP team, through the REED process, must review existing data, current classroom observation and assessments, teacher and related service provider information, and decide what assessments are or are not necessary for making the determinations set forth above.

The re-evaluation packet consists of the following documents, and must be sent in four (4) months prior to the re-evaluation due date:

RE-EVALUATION PACKET CHECKLIST

- ❖ Complete Special Education Re-Evaluation Form
 - [Re-evaluation Form](#)
- ❖ Medical Information – Vision/Hearing Screening and other health information
 - Medical Diagnosis (if a student has any condition requiring a medical diagnosis (i.e., ADHD, OI, CP, Diabetes, etc.) OHI cannot be considered without this except for OHI/ADHD, which characteristics can be reviewed by school psychologist/evaluator for a re-evaluation)
- ❖ Student Observation
 - For students classified SLD, the observation(s) must be in all area(s) of exceptionality
 - For students classified ID, there must be multiple observations in multiple settings
 - For students classified as OHI/ADHD, there must be three observations (two in a structured settings, and one in an unstructured setting)
- ❖ [Behavior Checklist](#) (two teachers filling out checklist is required)
- ❖ Psychological Assessment/Observation (for students classified as ED) – *School Psychologist completes this form*

RE-EVALUATION PROCEDURE FOR ALL STUDENTS EXCEPT SPEECH ONLY

- ❖ The case manager must monitor their students' re-evaluation dates using the ReEval IEP Monitoring Report in Special Programs.
- ❖ Four months prior to the re-evaluation due date, the case manager will complete the [Re-evaluation Form](#) and required documents. The re-evaluation packet will be sent electronically to the EPO evaluation coordinator at EPO using the [Parent Request/SAT Referral/ReEval Packets template](#). The EPO evaluation coordinator will notify the evaluator assigned to the school that a packet is ready for review.
- ❖ The evaluator notifies any related services providers of the REED draft and begins to complete the appropriate information. The related service provider (SLP, OT, and/or PT)

will complete the relevant sections of the REED making sure rationales are given and provide a statement whether more testing is needed or not.

- ❖ The evaluator collaborates with the related service providers regarding recommendations to evaluate
- ❖ **If no additional testing is recommended:**
 - Upon determining that no additional testing is needed, all eligibility determination forms for eligibilities CONSIDERED are completed by the evaluator or related services provider.
 - The evaluator emails the case manager to schedule the EDT/IEP meeting
 - The date this meeting occurs becomes the new evaluation date
- ❖ **If additional testing is recommended at the REED meeting:**
 - The IEP team meets and discusses the need for new information
 - The evaluator and related services providers complete the REED and indicate what information is needed
 - The evaluator obtains parental consent and completes the evaluation process (or monitors the completion of related services evaluations) as well as all EDT forms.
 - After all testing is completed, the evaluator notifies the case manager to schedule the EDT/IEP.
 - The date of the meeting becomes the new evaluation date
 - If additional testing occurs, then the most recent evaluation date becomes the date of the last evaluation.
- ❖ ***The evaluator is the “gatekeeper” of this process***

SPEECH ONLY 3-YEAR RE-EVALUATION & REED PROCEDURES

- ❖ The procedure for handling a Speech Only 3-Year Re-Evaluation remains essentially the same with the SLP acting in the role of evaluator and case manager.
- ❖ The SLP will submit the reevaluation to EPO using [Parent Request/SAT Referral/Re-Eval/Transfer](#) template to document and track the timeline
- ❖ The SLP will complete the process as identified above
- ❖ The SLP submits an update template upon completion of the process

REQUESTING ADDITIONAL TESTING FOR SPEECH ONLY STUDENTS

In some cases, the EDT may decide that while the student continues to qualify as a speech only student, a new area of exceptionality needs to be explored. In this case, a REED meeting is held as outlined above and the process called “[referring a speech only student to SAT due to additional concerns](#)” begins.

TRANSFER PROCEDURES - NOTE NEW PROCESS FOR SY25-26

When a student moves into Farmington Municipal Schools, and has an IEP, the following transfer procedures must be followed, keeping in mind that the services as outlined in the student's IEP from another school district must be provided until the Transfer IEP is held per NMAC 6.31.2 (1) and (2).

IN-STATE TRANSFERS:

- ❖ The School Secretary/Registrar will notify the Site Specialist a new student has enrolled who receives special education services.
- ❖ The Site Specialist will complete the [EPO Records Request](#) template and the [Parent Request/SAT Referral/Re-Eval/Transfer template](#) within one school day of enrollment to notify EPO to request records, and to notify the diagnostician a transfer student has enrolled, which will also notify the NOVA Administrative Assistant to add the student to the school's caseload.
- ❖ The EPO records secretary will request special education records from the previous school/district, and notify the Evaluation Coordinator of the transfer student. The Evaluation Coordinator will ensure the transfer student is listed on the assigned school's diagnostician's log by the next weekly update of the diag logs.
- ❖ When the documents have been received, the EPO Records Secretary will notify, by email, the site specialist and the school's evaluator that the records have been uploaded to PowerSchool Special Programs.
- ❖ The evaluator will review the evaluation report(s) and IEP within ten (10) school days of receipt of the paperwork.
- ❖ If no additional testing is needed, the assigned evaluator will notify the site specialist or case manager to schedule the transfer IEP meeting.
- ❖ The evaluator does not need to be invited to the IEP meeting if nothing is changing in the IEP for the student. The evaluator will communicate this information to the case manager.
- ❖ The evaluator will notify related service personnel, if needed.
- ❖ The case manager will request a meeting to be scheduled and invite the required participants, including related service personnel, if needed.
- ❖ *The case manager will prepare the Transfer IEP, and will hold the IEP meeting within 45 calendar days from the date of student enrollment.*
 - **Update:** In State transfer IEPs are considered an "Annual IEP". The meeting and services to the student should not be withheld due to non-participation by the parent. Hold the IEP meeting based on the [3/15 rule](#). Treat any In State Transfer as a student who is transferring within the district.
- ❖ The case manager will complete the Update Template to send to the NOVA Administrative Assistant within 24 hours of holding the transfer IEP.

***If more testing is needed:**

- ❖ The assigned evaluator will request from the case manager the initial or reevaluation referral packet which will be completed within ten (10) school days, which will be submitted using the [Parent Request/SAT Referral/Re-Evaluation/Transfer template](#).
- ❖ The assigned evaluator will complete the evaluation process including eligibility determination(s).

OUT-OF-STATE TRANSFERS:

- ❖ The School Secretary/Registrar will notify the Site Specialist a new student has enrolled who receives special education services.
- ❖ The Site Specialist will complete the [EPO Records Request template](#) and the [Parent Request/SAT Referral/Re-Eval/Transfer template](#) within one school day of enrollment to notify EPO to request records, and to notify the diagnostician a transfer student has enrolled, which will also notify the NOVA Administrative Assistant to add the student to the school's caseload.
- ❖ The EPO records secretary will request special education records from the previous school/district, and notify the Evaluation Coordinator of the transfer student. The Evaluation Coordinator will ensure the transfer student is listed on the assigned school's diagnostician's log by the next weekly update of the diag logs.
- ❖ When the documents have been received, the EPO Records Secretary will notify, by email, the site specialist and the school's evaluator that the records have been uploaded to PowerSchool Special Programs.
- ❖ The evaluator will review the evaluation report(s) and IEP within ten (10) school days of receipt of the paperwork.
- ❖ If no additional testing is needed, the assigned evaluator will notify the site specialist or case manager to schedule the transfer IEP meeting.
- ❖ The evaluator will notify related service personnel, if needed.
- ❖ The evaluator must be invited to the IEP meeting to discuss and complete the eligibility(ies) of the student.
- ❖ The case manager will request a meeting to be scheduled and invite the required participants, including related service personnel, if needed.
- ❖ *The case manager will prepare the Transfer IEP, and will hold the IEP meeting within 45 calendar days from the date of student enrollment.*
 - **Update:** Any student from out of state becomes an initial because they have to meet New Mexico criteria for eligibility. We must have parent participation and consent.
 - *Example: Not all States recognize Developmentally Delayed (DD). Does this student qualify under what New Mexico looks at for DD or the eligibility in which the student qualified for in another State?*

- ❖ The case manager will complete an Update Template to notify the NOVA Administrative Assistant within 24 hours of holding the transfer IEP.

***If more testing is needed:**

- ❖ The assigned evaluator will request from the case manager the initial or reevaluation referral packet which will be completed within ten (10) school days, which will be submitted using the [Parent Request/SAT Referral/Re-Evaluation/Transfer template](#).
- ❖ The assigned evaluator will complete the evaluation process including eligibility determination(s).

PRESCHOOL TRANSFERS: Follow the procedures outlined above for In-State and Out-of-State Preschool Transfers.

PLACEMENT REVIEW GUIDELINES FOR MAXIMUM LEVEL OF SERVICES - INCLUDES CHANGE IN GRADUATION PATHWAY

When *considering* placement in a maximum level of services pertaining to Farmington Municipal Schools (FMS) specialized programs: ***FMS Behavioral Management Program and Life Skills Program***, please follow the process as indicated below:

- ❖ If the student is a current FMS student, and a change of placement needs to be *considered*, the case manager will complete the [Placement Review form](#). The EPO Low Incidence Coordinator will work with the school's assigned diagnostician/school psychologist and school team to collect data that would support a change of placement to a more restrictive setting.
 - **Note:** The school's EPO diagnostician (for life skills) or school psychologist (for behavior programs), EPO Low Incidence coordinator, and the EPO director or the EPO assistant director must be included in the discussion to ensure appropriate placement to meet the needs of the student.
- ❖ After a review of the file, including the supporting documentation and data received from the school, and a change of placement is deemed appropriate, the EPO coordinator will contact the FMS Transportation Department to determine a school bus route that best meets the needs of the student based on the family's current address.
- ❖ The EPO coordinator will communicate directly (via in person or by phone) with school administration regarding the change of placement of an incoming or transfer student. The school administrator will notify the site specialist and program teacher. The EPO coordinator will follow up the conversation with an email and next steps with building administration and the special education team.

- ❖ If the student is a current FMS student, the school in which the student is currently enrolled will schedule and initiate the IEP meeting, and will invite the case manager and administrator from the receiving school to the IEP meeting.
- ❖ If the student has recently enrolled in FMS, but it is determined after reviewing the student's IEP from a previous school, that a maximum level of service is the appropriate placement for the student, the EPO coordinator will meet with the building administrator to advise of an incoming student. If a transfer IEP meeting has not yet occurred at the current home school (within 45 calendar days) the receiving school will schedule and initiate the transfer IEP meeting with the IEP team and parents.

Follow the NMPED guidance as outlined in "*Placement in the Least Restrictive Environment (LRE)*" by clicking [here](#).

IEP REVISIONS AND AMENDMENTS

❖ CLERICAL - REVISE THE CURRENT ANNUAL IEP

- A clerical revision to an IEP can be completed if dates are incorrectly entered on the demographics page, or a person is missing from a meeting participant page.
 - A new IEP meeting does not need to be scheduled
 - Parents must be contacted regarding the clerical revision
 - The clerical revision must be noted in the PWN with the revision date
 - Left side example: Revision (date) - Amendment date was incorrect on the Demographics page of the IEP
 - Right side example: Parent has been notified of the clerical revision, and agreed to the change via phone.
 - Clerical revisions do not require new signatures of meeting participants

❖ AMENDMENT - REQUIRES A NEW ANNUAL IEP

- Anytime there is a change in the Schedule of Services, or a new eligibility is being added, a new Annual IEP must be created.
 - An IEP meeting must be scheduled regarding the change to the IEP
 - All required meeting participants must be invited to the IEP meeting
 - Signatures are required of all meeting participants
 - Date of IEP meeting becomes new Annual IEP date

EXIT FROM SPECIAL EDUCATION PROCESS

When a student does not meet, or no longer meets, the criteria for being disabled under IDEA or meet the requirements for specially designed instruction, please follow the steps below:

❖ PROCEDURE FOR INITIAL DNQ (not an exit IEP) ([process is also listed under Initial Evaluation on p. 22](#))

- Evaluation report(s) are uploaded to PowerSchool Special Programs (PSSP).

- Schedule an IEP meeting with the IEP Team to review data.
- The following documents will need to be completed:
 - Notice of Invitation
 - Stand alone Prior Written Notice (PWN)
- The student will return to the MLSS process, or the team may consider a Section 504 Plan.

❖ **Procedure for Re-Evaluation DNQ (exit IEP)**

- Evaluation report(s) are uploaded to PowerSchool Special Programs (PSSP).
- Schedule an IEP meeting with the IEP Team to review data.
- Student will go back to the MLSS process, or the team may consider a Section 504 Plan.
- Complete the IEP pages as indicated:
 - [For students up to age 14](#)
 - [For students ages 14 and up](#)
- The student will return to the SAT process for monitoring, or the team may consider a Section 504 Plan.

❖ **Parent Revocation of Consent Special Education Services**

When a parent wishes to revoke special education services for their child, please follow the steps below:

- The case manager will contact their EPO facilitator to complete the Revocation of Consent for Special Education & Related Services form in PowerSchool Special Programs (PSSP), including the Prior Written Notice of Proposed Actions (PWN).
- A meeting is scheduled with the parent, case manager, and EPO facilitator to discuss the consequences of revoking services (loses the federal protections under IDEA, and would be required to go through the MLSS process to re-qualify).

***Note:** The parent cannot revoke partial services (i.e. keep services for reading or math, but remove social work services). If a parent revokes services, they are revoking ALL services. The only way to remove partial services is for the IEP team to determine that the student no longer needs a service based on data.

REPORTS

Reports are to be completed as soon as possible after the final date of testing. The following report sample format indicates what kind of information should be included in the report (the following format can be copied for use).

DIAGNOSTIC EVALUATION REPORT CONTENTS

The diagnostic evaluation report should contain:

- ❖ Student information:
 - Name

- Student Identification Number
 - Date of birth
 - Gender
 - Chronological age
 - Primary language or mode of communication
- ❖ Identification of assessment tools:
 - Dates given
 - Administered by whom
 - Whether administered under conditions not consistent with those provided by the producer of the test, and the evaluators' opinion on the impact to the validity of the test results.
 - ❖ Findings of previous assessments/evaluations.
 - ❖ Description of student's relevant behavior and relationship of that behavior to student's academic and functional skills.
 - ❖ Relevant health, developmental, and medical findings, including source of information
 - ❖ Student's performance on state and district wide assessments.
 - ❖ Name and title of the person who wrote the report and the date the report was completed.

IDENTIFICATION OF STUDENTS DISPLAYING CHARACTERISTICS OF DYSLEXIA

When evaluating for possible dyslexia, please follow the NMPED guidance and process by clicking [here](#).

MEDICAID

Farmington Municipal Schools receives funding for those students who are on Medicaid and receive related services and/or special transportation services. Those funds must be used to provide a medically based service, which is of benefit to all students (e.g. nursing, dietary services, etc.). Students who are eligible for Medicaid are recognized in SSG/MaxCapture and any services provided are automatically submitted for reimbursement. Nursing, SLP, OT, PT, Social Work, Psych, and COTA staff are expected to document daily and keep up to date Medicaid therapy notes for **all** students whether they are individual, group, or inclusion within the Medicaid site on a weekly basis. The SSG MaxCapture site is: [MaxCapture-I](#).

***Case managers are responsible for ensuring the following pages in the IEP are complete for Medicaid consent. If the student is a speech only student, the provider will be**

responsible for ensuring the appropriate pages are completed in the IEP as indicated below:

IEP Meeting (Case Manager):

- ❖ Discuss with parent/guardian that Farmington Municipal Schools participates in the Medicaid School-Based Services program to bill Medicaid for allowable services (speech, OT, PT, Audiology, and Nursing) provided to the student. We are seeking permission to bill Medicaid for allowable services if the student is, or becomes, Medicaid eligible.
 - Many times, circumstances change and a student who may not currently be Medicaid eligible, becomes eligible for different circumstances. If the parent will provide one-time consent, even if not currently eligible, we can bill should the student show eligible at some point in the Medicaid system.
- ❖ If a student is NOT Medicaid eligible, no further action is required for an IEP/EDT meeting except the Ordering and Referring Provider section on the Progress Documentation, Signatures page in the IEP still needs to be completed. There is a possibility the student may become Medicaid eligible in the future.
- ❖ Regardless if the student is Medicaid eligible or not, the Ordering and Referring Provider section on the Progress Documentation, Signatures page must be completed.
- ❖ If the student is receiving ONLY one related service then the provider is responsible to complete the Ordering and Referring Provider section on the Progress Documentation, Signatures page.
- ❖ The providers who are required to be on the Ordering and Referring Provider section are: Speech Language Pathologists, Occupational Therapists, Occupational Therapist Assistants, Physical Therapists, Audiologist per NM Medicaid School Based Services guidelines. If a student is receiving services from one or more of these providers, they are to be listed in the Ordering and Referring Provider section on the Progress Documentation, Signature page in the IEP.
- ❖ Request parent(s)/guardian(s) to complete One Time Medicaid Consent form for students who are Medicaid eligible. The document must be signed and dated by the parent.
- ❖ In some cases, the student may be eligible for Medicaid, but the parent does not wish to give consent. ***The Medicaid Specialist should be notified as soon as possible to ensure the student's services are not billed.***
- ❖ Ensure the proposal to bill Medicaid is captured in the Prior Written Notice (PWN). Statements for the preschool/elementary/secondary IEPs for the proposal and reason for acceptance/rejection are listed in the Public Statements Bank for both boxes.

IEP Meeting (Provider):

- ❖ If a student is Medicaid eligible and receiving ONLY one service then you are responsible to complete the Ordering and Referring Provider section on the Progress Documentation, Signatures page in the IEP.
- ❖ Request parents to complete One Time Medicaid Consent form for students that are medicaid eligible.
- ❖ In some cases, the student may be eligible for Medicaid, but the parent does not wish to give consent. The Medicaid Specialist should be notified to ensure the student's services are not billed.

One Time Medicaid Consent Form (Hard copy):

- ❖ If the student is Medicaid eligible then the One Time Consent form must be completed, signed and dated by parent(s)/guardian(s).
- ❖ New students to the district who have related services will need to have parent(s)/guardian(s) complete the One Time Medicaid Consent form.
- ❖ Parent(s)/guardian(s) of students who have transferred out of the district and transferred back to FMS will need to complete the One Time Medicaid Consent form again.
- ❖ Prior to each annual IEP meeting, review the previous documents in Powerschool Special Programs to ensure the student has a One Time Medicaid Consent form on file prior. If the student has a One Time Medicaid Consent on file, no further action is needed for this form. If the student does not have a One Time Medicaid Consent on file, proceed with the directions below:
 - [Medicaid One Time Consent - English](#)
 - [Medicaid One Time Consent - Spanish](#)
- ❖ Complete the hard copy which must be signed and dated by the parent. The One Time Consent must be uploaded by the case manager to PSSP. The form must be completed for all students who are receiving related services.
 - The form does not need to be completed if the student is not receiving related services.
 - The form does not need to be completed if a student is moved to consult for speech and is expected to be exited. Consult services need to be listed under Supplementary Aids and Services on the IEP.
 - If a student moves out of the district, and a One Time Medicaid Consent was signed and completed by the parent, and they transfer back to Farmington Municipal Schools, you will need to have the parent complete the One Time Medicaid consent again.
 - Please make sure the parent completes all areas highlighted in **GOLDEN YELLOW** on the Medicaid consent form.

- Ensure the parent/guardian(s) date the Medicaid Consent form. The date is needed when IEP information for the student is entered into the Medicaid billing system, Maxcapture.
- Upload the One Time Medicaid Consent to PowerSchool Special Programs (PSSP).

Annual Medicaid Consent

- ❖ If the student is on Medicaid, the case manager must provide the parent with Annual Medicaid Parental Notification, IDEA Part B Written Notification, and obtain a signature on the MSBS consent forms.
- ❖ The case manager only needs to provide written notification and obtain the MSBS signature one time, although it is district policy to obtain the Medicaid Parent consent at every annual meeting for all Medicaid eligible students, annually in the Progress Documentation page and Primary Care Provider Notification page of the IEP.
- ❖ The Annual Medicaid Parental Notification within the IEP is provided at every annual meeting for all Medicaid eligible students.
- ❖ The SLP/OT/PT/COTA/social worker/psych should assist the case manager in ensuring all the necessary Medicaid requirements have been addressed and documented and signatures are received on all required documents.

Primary Care Provider Notification Form (PCPN)

- ❖ This form must be completed for all students that are receiving related services such as (SPEECH, SOCIAL WORK, OT, T, PSYCHOLOGY, AUDIOLOGY).
- ❖ Obtain parent consent by clicking the parent will sign this page of the IEP. Parent will sign this page during the digital signature process.
- ❖ This form is required as it must be sent to the students primary care provider/clinic for acknowledgement of services the student is receiving from our district.

- ❖ This form allows for services that a student is receiving to be billable, and for our district to receive Medicaid payments which funding is used for salaries, health office and classroom equipment and supplies for students with disabilities.

****Reminder: If the parent does not wish to give consent to bill for the services their child is receiving, the Medicaid Specialist should be notified to ensure the student's services are not billed.***

DOCUMENTATION OF SERVICES

Documentation of services (Nursing, SLP, OT, PT, Social Work, Psych, COTA) is required for each individual student. Farmington Municipal Schools utilizes SSG/MaxCapture to capture all student services, regardless of if the student qualifies for Medicaid. Notes should be entered for all students that have related services listed in their IEP. Notes are expected to be entered into SSG regularly and in a timely fashion (weekly). Therapy notes should state the purpose of the session, the activity, the objective results, and the plan for the next session and/or a statement of progress towards goals. Notes should not contain names of other students or subjective information not relevant to the therapy session.

PROGRESS NOTES IN SSG

The intent of the "NOTES" documentation is to tie the service outcome back to the IEP goals and objectives. Documentation should include a brief description of the service or treatment activity, identify what progress was made during the service period, and describe the need for continued treatment and follow up. Consider the following questions when writing a progress note:

- Why did the student present for service/treatment today?
 - What kind of treatment did the student receive
 - What was observed during the service/treatment?
 - What was the outcome of the service/treatment?
 - How did the service/treatment support the student's goal(s)?
 - Is follow up needed?
- ❖ Notes should relate to the reason that the provider is seeing a student (diagnosis), describe in "clinical" terms what occurred, and indicate progress made, and possibly next steps. The notes can be 2-4 sentences (longer if needed) as long as key points are addressed.

FUNCTIONAL BEHAVIOR ASSESSMENT (FBA)/BEHAVIOR INTERVENTION PROCESS

(added 12/16/2025)

FUNCTIONAL BEHAVIOR ASSESSMENT (FBA)

Functional Behavior Assessments (FBAs) are used when the reason for a student's behavior that is interfering with their learning, or the learning of others, is not clearly understood. An FBA helps identify patterns, contributing factors, and conditions that influence and maintain the behavior. When FBA data indicate a need, a Behavior Intervention Plan (BIP) is developed to proactively teach and support the student in learning more appropriate and effective behaviors that serve the same function as the challenging behavior. Not all FBAs result in the development of a BIP.

When persistent behavior is observed, the teacher should begin collecting baseline data on the student's behavior. This may include information from frequency counts, duration measures, point or sticker systems, and other relevant data sources. The teacher will then meet with their schools Behavior Intervention Team/MLSS team to develop interventions to be implemented in the class.

Steps in the process:

1. Implement Layer 2 Interventions

The teacher implements Layer 2 MLSS behavior interventions using positive behavioral supports.

2. Collect and Document Data

The teacher documents student progress or lack of progress for 6–12 weeks. Data collection should be consistent and ongoing, recognizing that behavior change requires time and patience.

3. Review Layer 2 Progress

The teacher meets with the BIT/MLSS team to review data and determine effectiveness.

- If improvement is observed: Continue implementing and monitoring Layer 2 interventions.
- If improvement is not observed: The team provides Layer 3 interventions.

4. Implement Layer 3 Interventions

More intensive Layer 3 interventions are implemented and documented for 6–12 weeks.

- Note: If progress is not documented within 3–6 weeks of implementing Layer 2 supports, the teacher should return to the BIT/MLSS team to consider Layer 3

supports.

5. Review Layer 3 Progress

The teacher meets with the BIT/MLSS team to review data.

- If improvement is observed: Continue implementing and monitoring Layer 3 interventions.
- If improvement is not observed: The team determines whether an FBA is warranted.

6. Initiate FBA (If Warranted)

If the team determines that an FBA is needed, parent/guardian consent must be obtained prior to beginning the formal assessment.

For more details on the process see: [FBA Process](#)

BEHAVIOR INTERVENTION PLAN (BIP)

If the BIT/MLSS and/or IEP team determines a student's behavior impedes their learning or the learning of others, and the documented interventions that were implemented under MLSS Layers 2 and/or 3 were unsuccessful, the school team must develop an appropriate Behavior Intervention Plan (BIP) to support the student.

The information from the Functional Behavioral Assessment will drive the needed support in the Behavior Intervention Plan. The Behavior Intervention Plan (BIP) should include a clear, measurable, and objective description of the behaviors that are impacting learning, along with positive behavioral supports designed to teach and reinforce appropriate behaviors. These supports focus on helping the student develop new skills while reducing or replacing behaviors that interfere with learning.

- ❖ Follow the New Mexico Public Education Technical Assistance Manual: [Developing a Behavioral Intervention Plan](#), beginning on Page 37, for appropriate steps to develop a BIP that addresses the student's behaviors with positive, proactive interventions that teach new ways of behaving that will address both the source of the problem and the problem itself.
 - The student's BIT and IEP team, which shall include the parent, and the student if appropriate, shall assist with developing an appropriate BIP to meet the student's behavioral needs.
 - The team must get consent for an FBA and complete the assessment prior to discussing the need for a Behavior Intervention Plan

MANIFESTATION DETERMINATION REVIEW PROCESS

A manifestation determination review (MDR) should not occur until **all** other discipline options provided in the [EPO Discipline Guide For Administrators](#) have been exhausted.

Follow the [MDR Process](#) to continue with the manifestation determination if all other discipline options have been exhausted as outlined in the [EPO Discipline Guide for Administrators](#).

ALTERNATIVE LEARNING ENVIRONMENT (ALE) PROCESS

Follow the [ALE/Long Term Suspension Edgenuity Procedures](#) when a student is placed at the Alternative Learning Environment.

PRIVATE SCHOOLS

A parent whose child attends any private school, can request an evaluation for their child. If any of the private schools participate in IDEA funding, then Farmington Municipal Schools (FMS) must also provide related support services to that child, if the student qualifies; however, does not qualify to receive other special education support from FMS. A list of private schools who participate in funding can be obtained from the administrative assistant in the Student, School, and Family Support Department.

1. Private schools who are not accredited or participate in IDEA funding: Parents will receive the evaluation report, but do not receive a private school plan.
2. Private schools who are accredited and participate in IDEA funding: Parents will need to be invited to an IEP meeting to review the evaluation report and private school plan. We will follow the same process as our schools do, if the student qualifies for services:
 - For Speech only, the SLP will schedule the meeting, and the EPO facilitator will be the LEA.
 - For all other disabilities, the EPO facilitator will act as the case manager/LEA and schedule the meeting, and will develop the Private School Plan within PowerSchool Special Programs (PSSP).

The EPO facilitator will complete an Update Template to send to the STARS Administrative Assistant. Private school data must be reported to the State at each count day.