

# **Quick Reference Guide**



## **Section 1: Demographic Information**

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### **Tips for Developing a Quality and Compliant Individualized Education Program (IEP)**



**Michigan Department of Education  
Office of Special Education and Early Intervention Services**

**The purpose of the Demographic Information section is to provide information used for guiding timelines, assessment, service determination, public reporting, and eligibility.**

IEP DATES			
IEP Team Meeting	Initial IEP	Annual/Review IEP	Reevaluation IEP
	Offer of a FAPE: _____	Offer of a FAPE: _____	Offer of a FAPE: _____
	Implementation: _____	Implementation: _____	Implementation: _____

**IEP Dates:** This section is designed to ensure there are no gaps in the provision of service to a student with an Individualized Education Program (IEP). **[§ 300.323]**

**IEP Team Meeting Date**—This is the actual date the IEP meeting is concluded. The date entered is used to determine the required timeline for Notice. Within 7 calendar days of the district receiving the IEP form (i.e., the IEP meeting conclusion date), the district must provide written notice to the parent.

**Initial, Reevaluation, and Annual/Review IEP**—For a student's first IEP, fill in the dates for "Initial IEP." **[§ 300.323(c)]**

For an IEP resulting from a reevaluation IEP, fill in the dates for "Reevaluation IEP." **[§ 300.305(a)]**

For all other IEPs, fill in the dates for "Annual/Review IEP." **[§ 300.324(b)]**

For "Offer of a FAPE," list the date the district offers a Free Appropriate Public Education (FAPE) (i.e., the date Notice is provided by the district). For "Implementation," list the date the district will initiate the IEP. Implementation is required to be as soon as possible, and not later than 15 school days after the district's offer of a FAPE, pending parent consent. **[R 340.1722(a)(2)]**

The date of the offer of a FAPE for the first annual review must be within 365 days of the initial IEP implementation date. For all other offers of a FAPE, the offer of a FAPE must be within 365 days of the previous offer of a FAPE.

## Checklist

- ☐ The IEP team meeting date is indicated in the top left corner of the IEP form.
- ☐ Student information was updated and checked for accuracy.
- ☐ Parent information was updated and checked for accuracy.
- ☐ The native language or communication mode for the parent is identified.
- ☐ The purpose of the meeting is identified.
- ☐ The method of contact for the parent is identified, and the date and the outcome of the contact has been noted.
- ☐ The parent considered guardianship issues (if appropriate).
- ☐ Consent from the parent to invite an outside agency representative to attend the meeting on behalf of a student who is of secondary transition age is on file.
- ☐ Required IEP team members were invited.
- ☐ Required IEP team members attended.
- ☐ Both the parent and the district agreed upon and documented any team members excused prior to IEP team meeting.
- ☐ The IEP participants signed in attendance or their participation is documented.
- ☐ The determination of eligibility is identified.

**Checklist**  
continues on next page

<b>Student</b>	Last:	First:	M:	Birth Date:	Gender:	Grade:	UIC:
Address:				City:	State:	Zip:	
Phone:							
Resident District:				Operating District:			
County:				Attending Building:			
<b>Parent</b>	Last:	First:	M:	Relationship to Student:			
Native Language or Other Communication Mode:							
Address (if different):				City:	State:	Zip:	
Home Phone:		Work Phone:		Pager/Cell:			
Email:							
<b>Parent</b>	Last:	First:	M:	Relationship to Student:			
Native Language or Other Communication Mode:							
Address (if different):				City:	State:	Zip:	
Home Phone:		Work Phone:		Pager/Cell:			
Email:							

**Student Information:** In addition to the standard student information, this section includes a field for the student's Unique Identification Code (UIC). The UIC is used for data collection [i.e., the Michigan Student Data System (MSDS)]. Two sections are provided for parent information. This space is to be filled out as appropriate.

PURPOSE OF MEETING	
Check one of the following:	Check all others that apply:
<input type="checkbox"/> Initial IEP <input type="checkbox"/> Annual/Review IEP <input type="checkbox"/> Reevaluation IEP	<input type="checkbox"/> Change of Placement <input type="checkbox"/> Suspension/Expulsion <input type="checkbox"/> Secondary Transition <input type="checkbox"/> Change of Eligibility <input type="checkbox"/> Other: _____
	<input type="checkbox"/> Graduation <input type="checkbox"/> Other: _____

**Purpose of Meeting:** Options for determining the purpose of the IEP team meeting include initial IEP, annual/review IEP, or reevaluation IEP. Additional choices are intended to provide clarity. If *Change of Placement* is selected, the IEP team must provide further clarification by choosing Suspension/Expulsion, Graduation, or Other.

OFFICE USE	
PARENT CONTACT	
The parent/adult student was contacted to explain the purpose of the meeting and the roles and responsibilities of each participant via (check all that apply):	
<input type="checkbox"/> IEP Invitation <input type="checkbox"/> Letter <input type="checkbox"/> Phone <input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____
Results: _____	

**Parent Contact:** This section does not meet the requirements of Notice; however it is a place for the district to document the steps taken to ensure the parent of the student is present at the IEP team meeting or, at a minimum, has been afforded the opportunity to participate. Check the appropriate forum used by the district and document the result of the contact.

### Checklist continued

- ☐ If the student is a student with a specific learning disability (SLD), the area of SLD is identified.
- ☐ If the student is determined ineligible as a student with an SLD, a statement of the basis for the determination of ineligibility is provided.

PARENTAL RIGHTS AND AGE OF MAJORITY	
Check all that apply:	
<input type="checkbox"/>	The student will be age 17 during this IEP and the student was informed of parental rights that he or she will receive at age 18.
<input type="checkbox"/>	The student has turned age 18 and the student and parent were informed of parental rights that were transferred to the student at age 18, including the right to invite a support person such as a parent, advocate, or friend.
<input type="checkbox"/>	The student has turned age 18 and there is a guardian established by court order. The guardian is: _____
<input type="checkbox"/>	The student has turned age 18 and a legally designated representative has been appointed. The representative is: _____ (e.g., power of attorney, trustee)

**Parental Rights and Age of Majority:** This section has implications for confidentiality and eliciting procedural safeguards and therefore must be completed for all students who will be age 17 or older at any time during the IEP. Though decisions regarding guardianship, partial guardianship, or independence are to be documented when the student turns 18, it is recommended that decisions be completed well before the student turns 18. [**§ 300.320(c)**]

IEP MEETING PARTICIPANTS IN ATTENDANCE	
Check the box <input type="checkbox"/> indicating the IEP participant(s) who can explain the instructional implications of evaluation results.	
Student (must invite at age 16 and older)	<input type="checkbox"/> District Representative/Designee
Parent	<input type="checkbox"/> General Education Teacher
Parent	<input type="checkbox"/> Special Education Teacher
<input type="checkbox"/> Agency Providing Secondary Transition Services (consent on file)	<input type="checkbox"/> Other
<input type="checkbox"/> Other	<input type="checkbox"/> Other
<b>Parent and District Agreement on Attendance Not Necessary</b>	
These members are absent; their curricular area/related services are not being modified or discussed in the meeting: _____	
<b>Parent and District Agreement on Excusal Prior to Meeting</b>	
These members are absent and have submitted written input to the IEP team, including the parent, prior to the meeting: _____	

**IEP Meeting Participants in Attendance:** The public agency must ensure that the IEP team for each student with a disability includes the parent, a general education teacher if the student participates in the general education curriculum, a special education teacher, a public agency representative, other individuals who have knowledge or special expertise regarding the child (at the discretion of the parent or district), and whenever appropriate, the student. [**§ 300.321(a)**]

The agency must also ensure the presence of an individual who can interpret the instructional implications of evaluation results. It is allowable and may be appropriate for an IEP team member to serve multiple roles. [**§ 300.321(a)(5)**]

If the student is of transition age and is receiving services from an outside agency, the district is required to have consent from the parent on file prior to inviting the outside agency. [**§ 300.321(b)(1)**]

**IEP Meeting Participants in Attendance**  
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## Resources

- Michigan Student Data System (MSDS)  
<https://cepi.state.mi.us/msds>
- Michigan Administrative Rules for Special Education (MARSE)  
[www.michigan.gov/documents/mde/MARSE-April09\\_274156\\_7.pdf](http://www.michigan.gov/documents/mde/MARSE-April09_274156_7.pdf)
- Individuals with Disabilities Education Act (IDEA, Federal Regulations)  
<http://idea.ed.gov>
- A Seven-Step Process to Creating Standards-Based IEPs  
[www.cenmi.org/documents/sevensteps.pdf](http://www.cenmi.org/documents/sevensteps.pdf)

**Parent and District Agreement on Attendance Not Necessary**—If attendance of a required member of the IEP team meeting is determined not necessary because it has been determined that the member's area of the curriculum or related service is not being modified or discussed at the meeting, the district must have written agreement from the parent prior to the IEP team meeting. [**§ 300.321(e)(1)**]

**Parent and District Agreement on Excusal Prior to Meeting**—In order for the district to excuse a required IEP team member, written agreement must be obtained from the parent prior to the IEP team meeting. In addition, if the member's area of the curriculum or related service is being discussed, the excused member must submit written input for the development of the IEP to the IEP team prior to the meeting. [**§ 300.321(e)(2)**]

ELIGIBILITY FOR SPECIAL EDUCATION	
<input type="checkbox"/> Eligible	<input type="checkbox"/> Ineligible
Area of disability: _____	
If the student is determined ineligible as a student with a specific learning disability (SLD), provide a statement of the basis for the determination of ineligibility:	
_____	
If the student is determined eligible as a student with an SLD, check all that apply:	
<input type="checkbox"/> Oral expression	<input type="checkbox"/> Listening comprehension
<input type="checkbox"/> Written expression	<input type="checkbox"/> Basic reading skill
<input type="checkbox"/> Reading fluency skills	<input type="checkbox"/> Reading comprehension
<input type="checkbox"/> Mathematics calculation	<input type="checkbox"/> Mathematics problem solving
Determination of eligibility was made in accordance with IDEA regulations at § 300.306(c)(1).	

**Eligibility for Special Education:** After considering the evaluation results and the criteria for each area of disability evaluated, the IEP team is responsible for determining eligibility. [**R 340.1721(c)(2)**]

If the student is determined eligible, identify the area of disability and continue to develop the IEP. If the student is determined eligible in the area of specific learning disability (SLD), identify the appropriate area(s) of the specific learning disability. [**§ 300.309(a)(1)**]

If the student is determined ineligible for all areas of disability considered and is documented in this section as ineligible, the district may proceed directly to the provision of Notice to the parent, with the exception of the area of SLD. If a student is determined ineligible in the area of SLD, it is required that the IEP team provide a statement of the basis for this determination before the district proceeds to the provision of Notice to the parent. [**§ 300.311(a)(2)**]

The state model IEP form reflects only one area of disability. Federal regulations require that a student be determined eligible in order to receive special education services and programs. Since the development of services and programs are based on need, rather than disability area, one area is sufficient. [**§ 300.8**]



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