**Evaluation Planning Meeting (EPM)**

**Sample Agenda**

1. The Parents Rights booklet is offered to the parent if they have not yet been offered one this year. The offer of the booklet is documented in the student’s sped file. The parent is not required to take the booklet, but it does need to be offered annually.
2. Case manager opens the meeting by stating the purpose of the meeting (i.e.; “We are meeting today to plan for (student name)’s initial sped eligibility ~or~ (student name)’s three-year re-eligibility evaluation.” And so on…).
3. Case manager guides the team through introductions of each member and what their role is.
4. Case manager gives the floor to the school psychologist or evaluation specialist.
5. The eval spec or school psych will then ask the teachers and staff members for their input regarding the student’s strengths and needs at school and what interventions have been attempted thus far.**\***
6. The eval spec or school psych will also solicit parent input.**\***
7. The team will then decide to evaluate or to not evaluate. The vast majority of the time the referral is substantiated and the team moves to evaluate. This step may be skipped if it is obvious that an evaluation is warranted.

* Once in a great while the team realizes that there is not yet a need to evaluate for possible sped eligibility and another route is discussed. The school psych or eval spec will guide the team through this process.

1. The school psych or eval spec will then discuss the different assessments that they would like consent for. The assessments will correspond to the hypothesized eligibility category/categories. Everything will be explained to the parent and team.
2. If applicable, the other assessors (SLP, OT, ASD Consultant, etc.) will also discuss the assessments that they would like consent for.**\***
3. Minutes are taken and an eval plan is drawn up (concurrent with the above steps).
4. Consent

* At the case manager’s discretion, a consent form may be drawn up quickly towards the end of the meeting and presented to the parent to sign while they are there.
* If more time is desired and the parent is easy to access, the consent can also be drawn up after the meeting to avoid rushing.
* DocuSign or another digital signature program may be used to obtain the parent’s signature on the consent, if this is easier for the parent and case manager. Otherwise, the consent form can be signed in person using the method most preferred by the case manager and parent.

1. The case manager may wish to schedule a tentative date with the team (while everyone is there) for the eligibility meeting. The eligibility meeting is required to occur within 60 school days of consent (weekends and vacation days do not count).
2. The meeting is adjourned.

**\*Please make sure that these people attend the EPM or have provided their input that can be relayed to the team.**