

Initial ETR Checklist for Initial Evaluations

****Student Name:**** _____

****Date of Referral:**** _____

****Grade/Teacher:**** _____

****Case Manager:**** _____

Section 1: Pre-Referral and Referral Process

- Student Support Team (SST)/MTSS documentation reviewed
- Parent concerns documented
- Interventions attempted and data collected
- Prior Written Notice (PWN) for referral sent
- Referral form completed and signed by parent
- Update RtI and Referral Requests tabs in Master Roster

Section 2: ETR Planning Meeting

- Planning meeting scheduled and held
- Team members identified
- Parent invited and provided procedural safeguards
- Evaluation domains determined
- Consent for evaluation signed and dated
- Evaluation timeline (60 calendar days from consent) established

Section 3: Evaluation Process

- Evaluators assigned and aware of responsibilities
- Observations completed in multiple settings
- Standardized assessments administered
- Data collected and interpreted

Section 4: ETR Meeting and Report

- ETR meeting scheduled and parent invited
- Draft report prepared and shared
- ETR report sections fully completed
- Eligibility determined by team

- ETR copy provided to parent
- Prior Written Notice issued

Section 5: Post-ETR Follow-Up

- IEP meeting scheduled (if eligible)
- All documents uploaded/submitted
- Staff informed of student eligibility and next steps

****Signatures of Team Members Completing Checklist:****

****Date Checklist Completed:**** _____

Alternative Means of Evaluation Team Meeting Participation

In accordance with IDEA and district policy, parents/guardians and required team members may participate in ETR meetings through alternative means if in-person attendance is not possible.

Acceptable Alternative Participation Methods:

- Telephone Conference
- Video Conference (Zoom, Google Meet, etc.)
- Written Input Prior to Meeting
- Email Communication for Scheduling/Follow-Up
- Recording (if permissible by district policy and with consent)

Documentation Requirements:

- Parent was offered alternative means of participation
- Parent selected preferred method and consented
- Communication logs retained (e.g., call notes, emails, signed consent)
- Meeting notice included chosen method of participation
- Participation was documented in the ETR report and Prior Written Notice

****Parent/Guardian Participation Method:****

In-person Phone Video Written Input Other: _____

****Notes/Details:****

****Staff Initials:**** _____

****Date:**** _____