



Guidance and Procedure Document

Documentation and Tracking of Programs and Services

This document includes

- *The legal requirements for Program and Service Delivery;*
- *A procedure to ensure they are appropriately documented in the IEP;*
- *A procedure to ensure they are appropriately tracked; and*
- *Links to additional resources.*

Legal Requirements from the [IDEA](#), [MDE Individualized Education Program](#) (*multiple resource documents*), and MDE IEP Development: [Special Education Programs and Services](#)

IEP Development

When developing an IEP for a student, pursuant to the Individuals with Disabilities Education Act (IDEA), the IEP Team is required to include a description of the special education programs and related services, based on peer-reviewed research to the extent practicable, including modifications, accommodations and supports for school personnel, necessary to enable the student to:

- Advance appropriately toward attaining the annual goals;
- Be involved in and make progress in the general curriculum;
- Participate in extracurricular and other nonacademic activities; and
- Be educated and participate with other students with disabilities and nondisabled students. 34 CFR §300.320(a)(4).

Frequency, Location, Duration

The IDEA further requires programs and related services to include the projected date for the beginning of the services and modifications and the anticipated frequency, location, and duration of those services and modifications. 34 CFR §300.320(a)(7).

Implementation and Documentation

The program requirements are found in the IDEA and its implementing regulations. Therefore, districts must document the requirement to implement the IEP, consistent with 34 CFR §300.323(c)(2), with sufficient detail to show compliance with this regulation.

Procedure:

- Log all special education services (consult and direct) in EdPlan (EasyIEP).

Table adapted from BAISD

- Documentation of all direct services in Section 7 of the IEP (billable and nonbillable) must include:
 - Duration;
 - Group Size;
 - Description of Progress towards goal; and
 - Changes to Medical/Mental status and treatment plan.
- Documentation of all consult services in Section 5 of the IEP must include:
 - Duration; and
 - Description of support provided specific to the condition of consult services.
- Targeted Case Management (TCM) should be included in all IEPs where there are both Services and a Program listed in Section 7. TCM logs should be completed by the case manager on a monthly basis and include contacts with all service providers.

Additional Resources:

	Document Link	Description/ Use
1	IEP Development: Special Education Programs and Services	MDE Guidance document.
2	IDEA Sec 300.320	IDEA section describing IEP requirements related to programs and services.
3	EasyIEP Resources	Electronic training tutorials/resources from EasyIEP are available. These are located at the bottom of the home page for each district.
4	Letter to Copenhaver (2008)	US Department of Education policy letter related to Service Delivery.
5	Letter to Matthews (2010)	US Department of Education policy letter related to Service Delivery.

Guidance for Service Types in the IEP

In considering the frequency, duration, and setting/location of service, IEP teams should prioritize higher frequencies when considering the intensity and severity of the need as well as the location/setting best suited for skill acquisition with a focus on generalization into the general education curriculum/environment to the maximum extent possible. Additionally, in determining services needed, IEP teams may need to consider training/consultation with teachers/others regarding the implementation and/or usage of Supplementary Aids and Services.

Type of Service	Description of Service	Amount of Direct Work with a Student	Service Frequency	Where/How Service is Described in
Direct Service-providing SDI for goal(s) Program	Service is provided by working directly with the student to address a specific skill deficit or barrier to learning. Requires Specially Designed Instruction through the goal(s) and objectives.	Direct work with students is provided to work on a specific skill deficit or barrier to learning. Service may include some occasional consultation with others, but minimum is always met through direct work with the student.	Programs are typically provided daily. Direct services are typically provided weekly, bi-weekly, or monthly based on student needs.	Services are indicated by selecting from the drop-down on "Programs & Services." Conditions describe time/frequency, locations for learning, and the direct instruction provided.
Consult Services-Consultation and/or Indirect	Consult service is provided by working with the teacher(s) and others having regular contact with the student. Intent of consult services are to support student access to their curriculum and school environment. Indirect service is provided by developing and monitoring the use of accommodations used by the student. Does not require goal(s)/objectives.	Direct work with the student is not occurring, or at a very low frequency, on a short-term basis to learn how to use a tool or accommodation to support access to their environment and curriculum.	Consult services may occur short-term, within a specified timeline, or once a month or less. Ranges and conditions should clearly identify when and how consult services will be provided.	Services are indicated by selecting from the drop-down on Supplementary Aids & Related Services. Conditions describe time/frequency, who will be provided with the consultation, and what tools/strategies will be supported through consultation.
Ranges and Conditions	Ranges for direct service (i.e., low and high minutes) should be individualized based on the instruction (service) needed to achieve the goal(s)/objectives. Service providers should use caution to utilize wide ranges, such as 1 to 4 sessions per month, to ensure the range provided aligns with the student's demonstrated needs. Ranges should be as small as possible to ensure "individualized" instruction. Conditions for direct service should provide clarity around what the service will look like, especially if there is a unique circumstance. If service is a combination of direct and consult (in support of a goal), indicate in conditions that minimums will always be direct, and explain what remaining sessions may look like.			

Table adapted from BAISD