

Your Same Team Schools Guide

Every tool in the school toolkit, step by step. Written for a teacher, case manager or administrator opening it for the first time.

29

tools for teachers and administrators

5

guides by Dr. Long, plus the Red Flags flashcards

0

student names. Tools use student numbers from your key sheet

How to use this guide

Each tool gets one page. Find your situation on the next page, turn to the tool, and follow the numbered steps. Words in bold are the exact words you'll see on the screen.

Every tool page has four parts

Where to find it: the group on your toolkit dashboard

Step by step: what to type and what to click

What you get: what you walk away with

Good to know: limits, handoffs and privacy

Never a student's name

Same Team never has your students' names. Your key sheet gives each student a number, and you type only that number into a tool.

Every tool already runs on your computer. Nothing you type is uploaded, and the toolkit can be installed to work with no internet connection.

What the tools don't do

The tools lay out, check and word things. Decisions on eligibility, services and placement stay with the team and the family.

Start where you are

All 29 tools, in the toolkit's own groups. Turn to the page listed.

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Start where you are

For administrators, and the library behind every tool.

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First time? Start with your key sheet on page 6. Every other tool asks for a student number from it.

PART 1

Start here

Your key sheet and the name tools.

Your key sheet

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Print with names and Check for names

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Your key sheet

[Start here](#)

Get your staff code and a spreadsheet of student numbers, so you never type a student's name into any tool.

WHERE TO FIND IT Your library on your toolkit dashboard → Start here: your key sheet

STEP BY STEP

- 1 Open the page and note the code under **Your staff code**. Write it on your key sheet. Every student number you use starts with it.
- 2 Under **Download your key sheet**, pick **How many rows**: 100, 500, 2,000 or all 9,999.
- 3 Select **Download my key sheet (.xlsx)** and save it somewhere safe and password protected, like the computer you print from.
- 4 When you start with a new student, type their details into the next empty row and save. Use that row's number in every tool.
- 5 To test a number, type it under **Check a student number** and select **Check**.

WHAT YOU GET

An Excel file (.xlsx) with your student numbers already on it, one per row. Every download has the same numbers in the same order.

A quick way to confirm a number is typed right before anything is saved to the wrong child.

GOOD TO KNOW

- Type only the student number. Never a name, initials, birth date, parent name or district ID.
- Same Team can't recover your key sheet, so keep a backup copy somewhere safe. The sheet is a student record under FERPA.
- The case manager assigns the number and other staff use the same one. Never reuse a number or re-sort used rows.

Print with names and Check for names

[Start here](#)

Two buttons on every tool: print results with real names from your key sheet, and catch a name typed by mistake.

WHERE TO FIND IT Every tool → the two buttons at the bottom right of the page

STEP BY STEP

- 1 Run the tool first (build, check or write). **Print with names** needs results on the page.
- 2 Select **Print with names** and choose your key sheet (.xlsx or .csv).
- 3 Print from the dialog. Student numbers become names on that one printout.
- 4 Before you save or share anything, select **Check for names**.
- 5 Choose **Check against my key sheet**, or **Quick check (no key sheet)**.
- 6 Replace anything it finds with the student number, or take it out.

WHAT YOU GET

A printout with names in place of student numbers. The names never go into the form, storage or any file.

A list of names or personal details found in what's typed and on screen.

GOOD TO KNOW

- The key sheet is read on this computer for that one printout and kept nowhere. The next print asks for it again.
- Without the key sheet, the check catches emails, phone numbers, Social Security numbers, birth dates and common first names.
- Only the key-sheet check catches every name on your list.

PART 2

Before the meeting

IEP Draft Assembler

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IEP Draft Assembler

Before the meeting

Every required IEP section in the order the law sets, pre-filled from last year's IEP, checked, and labeled as a draft for the team.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → IEP Draft Assembler

STEP BY STEP

- 1 Under **Start**, type the **Student number** from your key sheet, then the **Grade** and **Age at the new IEP**.
- 2 Next to **Last year's IEP**, choose last year's PDF or Word file (optional). Its services, accommodations and goals come in for review.
- 3 Under **1. Present levels**, write the statement or paste one from the Present Levels Builder. Add **Parent concerns**.
- 4 Use + **Add a goal** and + **Add a service**, then fill in accommodations, placement and assessments.
- 5 Fill in **Transition and age of majority** if it applies, and each of the **Special factors** the team considered.
- 6 Select **Assemble and check the draft**. Work through what it flags, then copy or print the draft.

WHAT YOU GET

A full draft headed "Draft for team discussion", to copy or print.

A section-by-section list of what is filled, partial or empty, and what to fix or check.

GOOD TO KNOW

- There's no AI in this step. It assembles and checks. It never decides services, placement or eligibility.
- Everything carried over from last year is marked for the team to review. A scanned file can't be read; type it in.
- Goals are checked by Goal Coach and services by the Services Page Checker.

Services Page Checker

Before the meeting

Check every service in a draft IEP for its start date, how often, where and how long, before the meeting.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → Services Page Checker

STEP BY STEP

- 1 Select **Choose the draft IEP (PDF or Word) or drop it here** and pick the file, or drag it onto the box.
- 2 Select **Check the services page**.
- 3 Read the table. Each service shows its four details, with a flag on anything blank or missing a detail.
- 4 Read the quick look at each goal. To fix a goal, open it in Goal Coach.
- 5 Copy or print the fix list for your note to the team.

WHAT YOU GET

A table of every service with its four required details marked.

A quick look at each goal's wording, and a fix list to copy or print.

GOOD TO KNOW

- Read on this computer. The file is never uploaded. You can turn off Wi-Fi and it still works.
- A blank means "confirm where it's stated," not "out of compliance." "Needs detail" is a practice flag, not a legal finding.
- A scanned file can't be read. Check that services page by hand.

What Changed

Before the meeting

Compare last year's IEP with this year's draft and see what the family will see.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → What Changed

STEP BY STEP

- 1 Select **Choose last year's** and pick last year's IEP (PDF or Word).
- 2 Select **Choose this year's** and pick this year's draft. You can also drag each file onto its box.
- 3 Select **Compare the two**.
- 4 Read each change: last year beside this year, with one calm question to ask the team.
- 5 Copy the questions, save them as a text file, or print the page for the meeting.

WHAT YOU GET

A card for each change: minutes that went down, supports no longer listed, goals repeated word for word, time in general education that shifted.

A numbered list of questions for the meeting.

GOOD TO KNOW

- It's the same comparison families run, written to a parent ("your child"), so you see what they'll see.
- Both files stay on your computer. Nothing is uploaded or stored. Scanned or photographed documents are not supported yet.
- It compares services, goals, accommodation names and time in general education. It doesn't read progress reports or evaluations.

IEP Thread Check

Before the meeting

Every goal should have a service working on it, and every service should be working toward a goal.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → IEP Thread Check

STEP BY STEP

- 1 Select **Choose the draft IEP (PDF or Word) or drop it here** and pick the file, or drop it on the box.
- 2 Select **Check the thread**.
- 3 Read the count of goals with no matching service, and services with no matching goal.
- 4 Look down both tables, goals to services and services to goals, for rows with no match.
- 5 Copy or print the fix list for the team.

WHAT YOU GET

Two tables linking goals to services and services to goals.
A fix list to copy or print.

GOOD TO KNOW

- It matches by subject words, so every finding means "check by hand," not "wrong."
- Read on this computer. The file is never uploaded.
- The rule behind it: 34 CFR §300.320(a)(4)(i) and (a)(3).

Present Levels Builder

Before the meeting

Build the present levels statement area by area, get it checked, and turn each baseline into a goal.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → Present Levels Builder

STEP BY STEP

- 1 Type the **Student number** and **Grade**. Check **Preschool (ages 3–5)** if it applies.
- 2 Add **Parent concerns**, in their words as far as you can.
- 3 For each area, give the data, the baseline now, strengths, needs, and how the disability affects the general-education day. Use **+ Add an area** for more.
- 4 Select **Check and write**. Fix every item marked must fix before the statement goes in the IEP.
- 5 Copy or print the statement, or open Goal Coach from an area's baseline to write its goal.

WHAT YOU GET

A present levels statement to copy or print, checked area by area.
A link that carries each complete baseline into Goal Coach.

GOOD TO KNOW

- Checks look at what's written. They can't tell you whether it's accurate.
- The goal link appears only when an area's baseline is complete.
- The student number, baseline and measure travel to Goal Coach in the link. Nothing is sent to a server.

Goal Coach

Before the meeting

Check a draft goal for its parts, or build a measurable goal one part at a time.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → Goal Coach

STEP BY STEP

- 1 Under **Check a goal**, paste the goal into **Goal as written**. Add **Baseline (optional)** and **Target (optional)** if you have them.
- 2 Select **Check this goal** to see which parts were found and what is flagged.
- 3 To rebuild it, select **Fix it in the builder** ↓. It opens **Build a goal**.
- 4 Fill in **Student number**, **Timeframe**, **Condition**, **Observable behavior**, **Criterion**, **Baseline now (same unit)** and **How it is measured**.
- 5 Select **Build the goal**, then copy it, or open a data sheet for it to start tracking.

WHAT YOU GET

A check of timeframe, condition, observable behavior, criterion and measurement.

A finished goal sentence to copy, and a link to a data sheet with the goal filled in.

GOOD TO KNOW

- Use the student number from your key sheet, never a name. Nothing you type leaves this page.
- Empty parts stay in [brackets], so a half-built goal can't pass for a finished one.
- The checks look at wording only. They can't tell you whether a goal is right for the student.

Transition Plan Checker

Before the meeting

Check a draft IEP for each transition piece the regulation asks for, with the sentence found or a note that it's missing.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → Transition Plan Checker

STEP BY STEP

- 1 Select **Choose the draft IEP (PDF or Word) or drop it here** and pick the file, or drag it onto the box.
- 2 No file handy? Open **...or paste the transition section instead** and paste the transition pages.
- 3 Check the age-16 box if it applies, and the age-of-majority box if the student reaches it within a year.
- 4 Select **Check the transition plan**.
- 5 Read each quoted sentence. Anything not found means look again by hand. Copy or print the fix list for the team.

WHAT YOU GET

A found / not found line for each piece, with the IEP's own sentence quoted.

A fix list to copy or print before the meeting.

GOOD TO KNOW

- The file is read on this computer and never uploaded.
- It is a text search. "Found" means read the sentence; "not found" means check by hand. A scanned file must be checked by hand.
- Some states start transition planning earlier than 16, so check yours.

Evaluation Summary for Families

Before the meeting

Enter the scores once and get a plain-language table and a summary the family can read before the meeting.

WHERE TO FIND IT Before the meeting on your toolkit dashboard → Evaluation Summary for Families

STEP BY STEP

- 1 Type the **Student number** from your key sheet and the **Evaluation date**.
- 2 Add **Your name and how the family can reach you (optional)** if you want it on the summary.
- 3 Under **Scores**, fill in each score row. Use **+ Add a score** for more.
- 4 Select **Build the summary**.
- 5 Copy or print the family summary.

WHAT YOU GET

A table with each score, its percentile, a plain label and a likely range.

A plain-words summary the family can read before the meeting.

GOOD TO KNOW

- It uses the same math as the Same Team parent Report Decoder, so the two can't disagree.
- If your report prints its own confidence interval, use that one instead of the estimated range.
- It supplements your report. It doesn't replace your interpretation.

PART 3

504 plans

504 Plan Builder

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A Sheet for Every Adult

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504 Plan Builder

504 plans

Eligibility, accommodations with an owner for each one, and the review, checked against what Section 504's regulation requires.

WHERE TO FIND IT 504 plans on your toolkit dashboard → 504 Plan Builder

STEP BY STEP

- 1 Type the **Student number** and **Grade**.
- 2 Under **Eligibility**, describe the impairment, check the **Major life activities it substantially limits**, and say how, with the evidence.
- 3 Fill in **Information used** and **Who decided** (one per line: roles are fine).
- 4 Under **Accommodations and services**, give each one an owner. Use + **Add an accommodation** for more.
- 5 Set **Review by**, then select **Check and build the plan**.
- 6 Fix any must-fix items, then copy the plan or the family copy, or print.

WHAT YOU GET

A check list marking each problem must fix or worth fixing, with the rule cited.

The plan and a plain-words family copy, ready to copy or print.

GOOD TO KNOW

- Your district's 504 procedures and forms come first.
- One link carries the accommodations into A Sheet for Every Adult.
- Nothing you type leaves the page. Use the student number, never a name.

A Sheet for Every Adult

504 plans

One page for every adult who works with the student: only the supports that are theirs to give.

WHERE TO FIND IT 504 plans on your toolkit dashboard → A Sheet for Every Adult

STEP BY STEP

- 1 Type the **Student number**, pick IEP or 504 plan under **From**, and add the **Case manager / coordinator** and **How to reach them**.
- 2 Load the IEP file to read its accommodations, or type them under **Supports, one per line**.
- 3 Select **Suggest who each one is for**.
- 4 Check or uncheck the adults for each support.
- 5 Select **Make the sheets**, then copy one sheet or print them all, one per page.

WHAT YOU GET

One sheet per adult: gen-ed teachers, aides, substitutes, specials teachers, bus and lunch staff.

Each sheet lists only that adult's supports, who to ask, and that they can't change it on their own.

GOOD TO KNOW

- The tool suggests which adults each support applies to, and you confirm it.
- The IEP is read on this computer and never uploaded. Check found accommodations against the IEP.
- Share each sheet only with the adult it's for.

PART 4

Meetings, with the family

Shared Meeting Packet

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Student-Led IEP Kit

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Shared Meeting Packet

Meetings, with the family

One packet the school and the family both fill in before the meeting. Afterward it becomes one list of agreements the family can track.

WHERE TO FIND IT Meetings, with the family on your toolkit dashboard → Shared Meeting Packet

STEP BY STEP

- 1 Under **The meeting**, fill in the **Student number**, **Kind of meeting**, **Date**, **Time**, **Place** and **Purpose**, and check the notice boxes that apply.
- 2 Under **From the school**, add the **Agenda** and the **Items for discussion (write them as proposals, not decisions)**.
- 3 Select **Save the packet file** and send it to the family. When it comes back, use **Open a packet file**.
- 4 Select **Check and print the packet**. Fix anything marked must fix, then print.
- 5 After the meeting, add each agreement with **+ Add an agreement**, then select **Write up the agreements**.

WHAT YOU GET

A packet file to send to the family and reopen later, and a printed packet checked against the meeting-notice rules.

A written list of agreements, plus a file the family opens in their Same Team Follow-Through tool.

GOOD TO KNOW

- Your district's meeting notice form still goes out as required. This goes alongside it.
- Nothing is uploaded anywhere. This computer keeps a working copy.
- **Start a new packet** clears the current one, so save the file first.

Student-Led IEP Kit

Meetings, with the family

Help the student build an "About Me" page and practice what to say at their own meeting, in their own words.

WHERE TO FIND IT Meetings, with the family on your toolkit dashboard → Student-Led IEP Kit

STEP BY STEP

- 1 Type the **Student number** from your key sheet.
- 2 Under **Version**, choose **Younger students (simple)** or **Older students (adds after high school)**.
- 3 Sit with the student while they answer the prompts. They can skip anything they don't want to share.
- 4 Select **Make my About Me page**.
- 5 Go over the page and the practice lines together, then copy or print it.

WHAT YOU GET

An About Me page in the student's own words, to copy or print.

Lines the student might say at the meeting, and a short list for before it.

GOOD TO KNOW

- The kit writes only what the student says. It adds nothing of its own.
- Nothing typed leaves this computer or is saved anywhere, unless you print it or save the page yourself.
- The prompts are working wording and will be finalized before this is used with a student.

PART 5

Moves and handoffs

Transfer Kit

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Age-3 Handoff

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Transfer Kit

Moves and handoffs

A student with an IEP or 504 plan moves in or out: one checklist for the receiving school and one for the family.

WHERE TO FIND IT Moves and handoffs on your toolkit dashboard → Transfer Kit

STEP BY STEP

- 1 Type the **Student number** from your key sheet.
- 2 Under **Plan**, pick **IEP** or **504 plan**.
- 3 Under **The move**, pick same state, another state, or over the summer.
- 4 Enter the **Enrolled (or will enroll)** date. Check **Military family** if it applies.
- 5 Select **Make the checklists**, then copy each one or print both.

WHAT YOU GET

A checklist for the receiving school and a checklist for the family.
Both ready to copy, or printed together.

GOOD TO KNOW

- Built from 34 CFR §300.323(e), (f) and (g) and §300.323(a).
- Section 504 has no equivalent transfer rule, so what the kit says for 504 plans is marked as practice.
- Your state may add rules of its own.

Age-3 Handoff

Moves and handoffs

From early intervention to preschool special education: every date counted back from the third birthday, for the district and for the family.

WHERE TO FIND IT Moves and handoffs on your toolkit dashboard → Age-3 Handoff

STEP BY STEP

- 1 Type the number from your key sheet in **Child's student number**, then enter the **Date of birth**.
- 2 If the birthday falls near summer break, fill in **District's last day of school that year (optional)** and **First day of the next school year (optional)**.
- 3 Select **Show the dates**. A table lists the third birthday and each deadline before it, with its rule. Dates already gone are tagged past.
- 4 Copy the district timeline into your notes, and copy or print the family timeline.

WHAT YOU GET

A dated timeline: the transition conference window, the notice to the district, and the third-birthday IEP deadline.

A district summary and a separate family summary.

GOOD TO KNOW

- Dates follow 34 CFR §303.209(b)–(c) and §300.124(b)–(c). Your state may set earlier dates or an opt-out policy for notification.
- A birthday between your last and first school days is tagged "birthday between school years": the IEP team decides when services start.
- Type only the student number. Nothing typed leaves the page.

PART 6

Deadlines and notices

Deadline Desk

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Deadline Calculator

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Prior Written Notice Builder

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Deadline Desk

Deadlines and notices

Your caseload by student number, with each student's next deadline sorted into overdue and the next 30, 60 and 90 days.

WHERE TO FIND IT Deadlines and notices on your toolkit dashboard → Deadline Desk

STEP BY STEP

- 1 Under **Add a student**, type the **Student number** from your key sheet and choose the **State**.
- 2 Enter the dates you have: **Consent for initial evaluation**, **Eligibility determined**, **Last IEP meeting** and **Last evaluation**. Leave consent empty if the student already has an IEP.
- 3 Select **Add to caseload**. Each deadline lands by how soon it's due, or under check by hand.
- 4 Select **Save a backup file** now and then. **Load a backup file** brings the caseload back.
- 5 Share it with **Download spreadsheet (.csv)**, **Add all dates to my calendar (.ics)** or **Print**.

WHAT YOU GET

A deadline board from overdue through 90 days out: initial evaluation, first IEP, annual review and reevaluation.

A spreadsheet, a calendar file with a reminder 14 days before each date, and a backup file.

GOOD TO KNOW

- Initial evaluation uses your state's rule, from the same engine as the public Same Team deadline calculator.
- Check each date against your district's calendar and your state's rules before you rely on it. Some states set shorter timelines.
- The caseload stays in this browser on this computer. Save a backup before the browser is cleared.

Deadline Calculator

A one-off calculator: fill in any of five dates and get every deadline out in one table, each with its rule.

WHERE TO FIND IT Deadlines and notices on your toolkit dashboard → Deadline Calculator

STEP BY STEP

- 1 Under **Fill in any of these dates**, enter only the ones you have. A blank date's rows are simply left out.
- 2 For an **Initial evaluation**, pick the **State** and the **Consent for the initial evaluation** date. Under **IEP**, add **Eligibility determined**, **Last IEP meeting** or **Last evaluation**.
- 3 For **Turning 3**, enter the **Child's date of birth**. For **Discipline**, enter the **Date of the decision to change placement** and any **Days your school is closed (optional)**.
- 4 Select **Show the deadlines**.
- 5 Read the table under **Deadlines, by date**, then **Copy as text** or **Print**.

WHAT YOU GET

One table, sorted by date: what is due, the rule or source, and a note.

The 10 school days to a manifestation determination, with weekends and federal holidays skipped.

GOOD TO KNOW

- There is no student number and nothing is saved. To keep a caseload with dates, use the Deadline Desk.
- Check each date against your district's calendar and your state's rules before you rely on it.
- Some states set shorter timelines than these federal floors, so check yours.

Prior Written Notice Builder

Deadlines and notices

Fill in the seven parts the regulation lists. It flags what's missing, boilerplate or jargon, then gives you a notice to paste into your district's form.

WHERE TO FIND IT Deadlines and notices on your toolkit dashboard → Prior Written Notice Builder

STEP BY STEP

- 1 Fill in **School / district**, **Date of notice**, **Student number** and **Case manager name and phone**, then choose what **This notice concerns**.
- 2 Check **Parent's language**. If this is the initial referral for evaluation, check that box.
- 3 Write each of the seven numbered parts, following the hint under each box.
- 4 Select **Check and build the notice**. Fix each problem it lists first, then read what is worth fixing.
- 5 Copy the notice into your district's form, or print it.

WHAT YOU GET

A plain-text notice, seven parts in regulation order, ready to paste into your district's form.

A fix list, with flags for boilerplate phrases and jargon a parent won't understand.

GOOD TO KNOW

- The seven sections follow 34 CFR §300.503(b)(1)–(7). Your district's own PWN form and procedures come first.
- The "boilerplate" and "jargon" flags are practice advice, not legal findings. Check it against your state's rules.
- Nothing you type leaves this page.

During the year

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Progress Report Writer

During the year

Baseline, goal and data points in. Out come the report paragraph, a status line, a next step and a family version.

WHERE TO FIND IT During the year on your toolkit dashboard → Progress Report Writer

STEP BY STEP

- 1 Type the **Student number** from your key sheet and the **Goal, in a few words**.
- 2 Enter **Baseline number (from the IEP)**, **Target number (from the goal)** and the **Unit**, then the **IEP start date** and **Annual review date**.
- 3 Under **Data points (probe or report dates and scores)**, enter a date and score on each row. Use + **Add a data point** for more.
- 4 Select **Write it**.
- 5 Read every sentence, then copy the report, status and next step, or the family version, or print.

WHAT YOU GET

A progress-report paragraph, a status line for your district's code and a next step.
A plain-words version for the family.

GOOD TO KNOW

- It needs six or more data points to call on track or behind. With fewer, it says the read is early.
- Same pace math as the Same Team parent Progress Check. You sign the report, not the tool.
- The citation §300.324(b)(1)(ii)(A) appears only when the data is off pace. Nothing you type leaves this page.

Data Sheet from a Goal

During the year

A printable progress-monitoring sheet, already filled in with the goal, baseline, target, measure, every collection date and an aim line.

WHERE TO FIND IT During the year on your toolkit dashboard → Data Sheet from a Goal

STEP BY STEP

- 1 Type the **Student number** from your key sheet and the **Unit**, and paste the **Goal**.
- 2 Enter the **Baseline** and **Target** as numbers, then the **First collection** date and the **Goal date / annual review**.
- 3 Choose **How often: Weekly, Every two weeks** or **Monthly**. Describe it under **Measured how**.
- 4 Select **Make the sheet**, then print it and record each score by hand.
- 5 When the sheet is full, type the scores into the Progress Report Writer.

WHAT YOU GET

A printable sheet: goal, baseline, target, measure, and a chart with the aim line drawn in.

A table of every collection date with its aim number and blank score and note columns.

GOOD TO KNOW

- Goal Coach can open this tool with its finished goal already filled in.
- Keep the measure the same every time so the scores can be compared.
- Baseline and target must be numbers, and the goal date must come after the first collection.

Progress Monitor

During the year

Graph progress data and apply the decision rules: baseline median, aimline, trend line, a fidelity check first, then a summary for PST notes.

WHERE TO FIND IT During the year on your toolkit dashboard → Progress Monitor

STEP BY STEP

- 1 Open + **Add a student**, type the **Student number** and select **Start monitoring**.
- 2 Enter three baseline probes, the goal and the weeks. The tool works out the baseline median, the growth needed per week and the aimline.
- 3 Add each probe as you give it, and mark any change to the intervention.
- 4 Add fidelity checks: sessions delivered and planned. Low fidelity is flagged before the student's response is judged.
- 5 Read the decision and copy the summary into your PST meeting notes.

WHAT YOU GET

A graph with baseline, aimline, trend line and plan changes, and the decision rule applied.

A summary you can paste into PST meeting notes.

GOOD TO KNOW

- It graphs your data and applies the written rules. The team makes the decision, and a parent can ask for an evaluation at any time.
- Data is kept in this browser on this computer. Use **Save a backup file** now and then.
- Use **Open the sample student (MTSS guide, fictional)** to practice before your own data.

Missed & Make-up Services

During the year

Log every promised session that didn't happen: why, and what was made up. The team gets a clear balance and the family an honest update.

WHERE TO FIND IT During the year on your toolkit dashboard → Missed & Make-up Services

STEP BY STEP

- 1 Type the **Student number**. Under **Services from the IEP (name and minutes per week)**, enter each service. Use **+ Add a service** for more.
- 2 Under **Log a session**, pick the **Date**, the **Service**, and **What happened: Session missed or Make-up session given**.
- 3 Enter the **Minutes**. For a missed session, choose **Why missed**. Add a **Note** if useful.
- 4 Select **Add to the log** and read the balance and any flags.
- 5 Copy the team record or the family update. **Save a backup file** now and then.

WHAT YOU GET

A balance for each service: minutes missed, made up, and not yet made up.

A record for the team, an update for the family, and a spreadsheet of the log.

GOOD TO KNOW

- The tool doesn't decide what's owed. Whether and how missed services are made up is the IEP team's decision.
- School-side misses are kept apart from student absences, because teams usually treat them differently.
- The log is kept in this browser on this computer.

Accommodation Fidelity Log

During the year

A general-education teacher's one-minute weekly check: was each accommodation given as written?

WHERE TO FIND IT During the year on your toolkit dashboard → Accommodation Fidelity Log

STEP BY STEP

- 1 Open + **Add a student**. Type the **Student number**, the class if you want one, and the **Start logging from** date.
- 2 Copy the accommodations word for word from the IEP or 504 plan, one per line, or read them from the IEP file.
- 3 Select **Start the log**.
- 4 Once a week, mark each accommodation: given as written, in part, not given, or no chance this week. Save the week.
- 5 Copy the record for the case manager, download the spreadsheet, or print.

WHAT YOU GET

A running record of each accommodation, week by week, for the case manager.

An early warning when one keeps slipping.

GOOD TO KNOW

- An accommodation not given in 2 or more of the last 4 logged weeks is flagged: talk to the case manager now.
- An IEP file is read on this computer and never uploaded. Check what it finds against the IEP.
- It keeps a record only. It doesn't change the IEP or 504 plan, and only the team can change those.

Accommodation or Modification?

During the year

A sorting game for staff: sixteen real classroom examples from the teacher's guide, each with instant feedback and the reason.

WHERE TO FIND IT During the year on your toolkit dashboard → Accommodation or Modification?

STEP BY STEP

- 1 Read the example on the card.
- 2 Drag it into a column, tap **Accommodation** or **Modification**, or press A or M.
- 3 Read whether it's right and why.
- 4 At the end, read your score and the ones you missed.
- 5 Select **Play again** to go through them again.

WHAT YOU GET

A score, and the reason behind each answer.

A quick warm-up for professional development.

GOOD TO KNOW

- In a group: read the card aloud, have everyone decide before anyone sorts it, then talk about the ones you split on.
- There is no student data in it: no names and no student numbers.
- Read more in the teacher's guide, Part 6: Implementation.

For administrators

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Removal Day Counter

For administrators

A running count of every day a student with an IEP or 504 plan has been removed this school year, counting everything. It tells you when the 10-day rules apply.

WHERE TO FIND IT For administrators on your toolkit dashboard → Removal Day Counter

STEP BY STEP

- 1 Set the **First day of this school year** once, and add the **Days with no school (holidays, breaks)**. Weekends are skipped already.
- 2 Type the **Student number** from your key sheet and select **Open**.
- 3 For each removal, fill in the **Date (first day, if more than one)**, **School days**, **Kind of removal** and **Reason (up to 200 characters)**, mark it formal or informal and full or partial day, then select **Add the removal**.
- 4 Read the count beside Dr. Long's rules: up to 10 school days, beyond 10 cumulative days, more than 10 consecutive days or a pattern.
- 5 After a serious incident, fill in the First 24 Hours sheet with an owner for each step and select **Print this sheet**.

WHAT YOU GET

A running count of removal days for each student number, set against the federal 10-day rules in Dr. Long's words.

A printable First 24 Hours sheet, and a printout of one student's removals.

GOOD TO KNOW

- A partial day counts as a full day in the count. So does an informal removal. Two removals on the same date count once.
- A pattern is never decided here: the team decides. Check the IEP and BIP before deciding any removal.
- The count is only as good as what is entered. The rules come from the federal regulations; your state and district may add their own.

Administrator Checklists

For administrators

Dr. Long's checklists from the Administrator Toolkit, one section each. Tick an item, name who owns it and when it was done.

WHERE TO FIND IT For administrators on your toolkit dashboard → Administrator Checklists

STEP BY STEP

- 1 Type your school in **School (optional, shows on the printout)**.
- 2 Go to the section you need: start of year, LEA representative meeting, prior written notice, discipline and MDR, shortened school day, the quarterly implementation audit, or the first 24 hours after a serious incident.
- 3 Tick each item as it is done, and fill in its owner and the date.
- 4 Print that section, or select **Print all**.

WHAT YOU GET

Seven checklists in Dr. Long's words, with an owner and a date beside each item.

A printout of one section or all of them, with your school's name on it.

GOOD TO KNOW

- Owners are staff names. Nothing about a student goes on this page.
- Ticks, owners, dates and the school name stay in this browser on this computer. **Clear this computer** removes all of it.
- The first-24-hours section points to the Removal Day Counter, which has the printable sheet.

Implementation Audit

For administrators

Each quarter, check five students' IEPs against what is really happening. Every "partly" or "no" becomes a corrective action with an owner and a due date.

WHERE TO FIND IT For administrators on your toolkit dashboard → Implementation Audit

STEP BY STEP

- 1 Choose the **School year** and **Quarter**.
- 2 Select **Pick five at random** to draw from the Deadline Desk caseload on this computer, or type five student numbers from your key sheet.
- 3 For each student, answer the seven checks yes, partly or no, with a short note on what you saw.
- 4 Give each partly or no an owner and a due date.
- 5 Under **Open corrective actions**, tick verified once someone has checked the fix. Select **Print this quarter** for your records.

WHAT YOU GET

Five students checked seven ways, from service minutes and accommodations to progress data and parent contacts.

One open list of corrective actions across every quarter, soonest due first, overdue ones in red, until someone verifies each fix.

GOOD TO KNOW

- Student numbers only. The evidence notes are for what you saw, not for names.
- Picking at random only reads the Deadline Desk caseload. It never changes it.
- Dr. Long: follow up on every corrective action by a set date.

Administrator Self-Audit

For administrators

Dr. Long's ten questions, answered each semester with your leadership team: yes, partly or no, with the evidence for each answer.

WHERE TO FIND IT For administrators on your toolkit dashboard → Administrator Self-Audit

STEP BY STEP

- 1 Choose the **School year** and **Semester**. Fall is August to December; Spring is January to July.
- 2 With your leadership team, answer each of the ten questions yes, partly or no, and note the evidence.
- 3 Give every partly or no a next step, an owner and a date. They collect under **Next steps**.
- 4 Select **Compare with last semester** to see what got better, worse or stayed the same.
- 5 Select **Print this semester** to keep the completed audit.

WHAT YOU GET

A completed self-audit with evidence and next steps, saved for each semester.

Last semester beside this one, question by question.

GOOD TO KNOW

- No student names or numbers. The questions are about your building, not about one student.
- Watch for answering "yes" from memory instead of evidence, and for completing the audit once and filing it.
- **Start fresh** empties the semester shown. **Clear this computer** removes every semester.

Administrator Quick Sheets

For administrators

Dr. Long's four one-page sheets to keep where you can find them fast: whom to call, what to say instead, the emergency paths and the one-page dashboard.

WHERE TO FIND IT For administrators on your toolkit dashboard → Administrator Quick Sheets

STEP BY STEP

- 1 On the whom-to-call sheet, type your own staff names and numbers beside each role.
- 2 Read through the other three: say this instead, the emergency paths and the one-page dashboard.
- 3 Select **Print this sheet** under any sheet, or **Print all four**.
- 4 Keep the printouts close: in your office, at the front desk, in the meeting room.

WHAT YOU GET

Four printed one-page sheets in Dr. Long's words.

A whom-to-call sheet with your own people's names and numbers filled in.

GOOD TO KNOW

- Your staff names and numbers are meant to print. That is the one place names belong. No student names or numbers go on any sheet.
- Say this instead works for meetings and for staff training.
- What you type stays in this browser on this computer. **Clear this computer** removes it.

Administrator Reference Calendar

For administrators

Dr. Long's year at a glance: what to check before school starts, in the first 30 days, every month, every quarter and every year, and what to do when something comes up.

WHERE TO FIND IT For administrators on your toolkit dashboard → Administrator Reference Calendar

STEP BY STEP

- 1 Under **Your school year**, enter **School year starts** and the **Monthly check on day (1–28)**.
- 2 Look over the **"Before school starts" reminder** and the **"First 30 days" check**. They start a week before and 30 days after the school-year start; change either if your year needs it.
- 3 Put an owner on each row.
- 4 Select **Add to my calendar** and open the file with Outlook, Google Calendar or Apple Calendar.
- 5 Select **Print** for the reference card.

WHAT YOU GET

One calendar file with five reminders: before school starts, first 30 days, monthly, quarterly and annually, each with its owner.
A printed card for IEP meetings, concerns, transfers and serious incidents.

GOOD TO KNOW

- Owners are staff names, and they go on the calendar and the printout. No student names or numbers on this page.
- The other five rows are a reference card, not calendar events.
- Dates and owners stay in this browser. **Clear this computer** removes them.

PART 9

Your library

Dr. Long's guides, Ask Dr. Long and the Red Flags flashcards.

The teacher's handbook

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The Administrator's Guide

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The Assessment Key

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Ask Dr. Long

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The MTSS and Problem-Solving Team guide

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Red-flag flashcards

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The teacher's handbook

Your library

Dr. Long's full guide for classroom teachers, from a first concern to a working IEP, and what each step asks of you. Read it on screen or open the 87-page PDF.

WHERE TO FIND IT Your library on your toolkit dashboard → The teacher's guide

STEP BY STEP

- 1 New to special education? Start with the case study. It follows one student through every step.
- 2 Read Parts 1–4 before a concern becomes a referral, and Parts 5–6 before your first day with a student who has an IEP.
- 3 Use Parts 7–12 as a reference: behavior, access, Section 504, progress and data, transition, safeguards, and when it gets hard.
- 4 Select **Print just this card** for the Quick Reference Card and keep it at your desk.
- 5 Use the email templates, checklists and printables when you need them.

WHAT YOU GET

The Quick Reference Card, key timelines, red flags, the escalation cycle, checklists and email templates on one page.

The full handbook (PDF, 87 pages), with each part linked to its page.

GOOD TO KNOW

- The timelines are federal minimums. Many states set shorter ones; confirm yours with your special education office.
- Educational information, not legal advice. It does not replace your state's rules or your district's policies.
- The red flags have their own practice cards: the Red Flags flashcards, page 51.

The Administrator's Guide

Your library

Dr. Long's desk reference for principals, assistant principals, special education administrators, 504 coordinators and anyone serving as the LEA representative.

WHERE TO FIND IT Your library on your toolkit dashboard → The Administrator's Guide

STEP BY STEP

- 1 Read the three things to know before you start, and the Administrator Standard's six questions.
- 2 Find your situation in the list of parts: each row says "Start here if...".
- 3 Select a part's name to open the full guide at that page.
- 4 Each chapter follows the same five steps: Know it, Watch for it, Do it, Document it, and Ask.

WHAT YOU GET

The full guide (PDF, 107 pages): 19 parts, the case study, the Q&A, the Administrator Toolkit and the federal references.

Links from the parts to the tools that go with them, such as the Removal Day Counter.

GOOD TO KNOW

- When one of the six questions has no clear answer, that is the place to stop and investigate, not guess.
- Federal law sets the floor; your state may require more. When a state or local rule is more specific, follow it.
- Educational information, not legal advice.

The Assessment Key

Your library

Dr. Long's handbook on psychometric testing for evaluators, case managers and IEP teams: 59 instruments, how the scores line up, and a score converter.

WHERE TO FIND IT Your library on your toolkit dashboard → The Assessment Key

STEP BY STEP

- 1 Under **Find an instrument**, type a test name, an acronym or an area. Each one opens to its page in the handbook.
- 2 Read how the scores work: standard, scaled and T-scores, and the classification bands.
- 3 In the score converter, choose the kind of score, type the **Score**, and read its percentile rank and classification.
- 4 Select **Copy the sentence** to take the one plain-language line for a family.
- 5 Check which domains teams most often use for each IDEA category.

WHAT YOU GET

59 instruments by name or acronym, each linked to its page in the 36-page handbook.

A percentile, a band and one sentence for families from any one score.

GOOD TO KNOW

- One score never decides eligibility. IDEA requires a full evaluation from more than one source.
- The converter uses the normal curve; the percentile in the score report is the one to cite.
- No student information is needed in the converter. Nothing is saved or sent.

Ask Dr. Long

Your library

Send Dr. Long a question about your work: an evaluation, an IEP, a 504 plan, behavior, MTSS, transition or a meeting with a family. Her answer shows on the page.

WHERE TO FIND IT Your library on your toolkit dashboard → Ask Dr. Long

STEP BY STEP

- 1 Fill in **Your name** and **Your school district**. Dr. Long sees both with your question.
- 2 Pick a **Topic (optional)**.
- 3 Write **Your question**, up to 4,000 characters, using student numbers only.
- 4 Tick **Also check against my key sheet** to have Send look for your students' names too. The sheet is read on this computer for that one Send.
- 5 Select **Send to Dr. Long**. Your question waits under **Your questions** until she answers.

WHAT YOU GET

Dr. Long's answer, under your question, on the same page.

A list of everything you have asked, with the date she answered.

GOOD TO KNOW

- This is the one place in Same Team Schools that sends what you type. Before it goes, Send checks for names, emails, phone numbers, birth dates and Social Security numbers; if it finds one, nothing is sent.
- Not for emergencies. For a safety concern, follow your school's procedures now.
- Her answers are educational information, not legal advice.

The MTSS and Problem-Solving Team guide

Your library

Dr. Long's guide for PST and MTSS teams, from the first concern about a student through a referral for evaluation: what to try, how to measure it and what to put in writing.

WHERE TO FIND IT Your library on your toolkit dashboard → The MTSS and Problem-Solving Team guide

STEP BY STEP

- 1 Find your situation under "Where to start", such as a screener flags a student or a parent requests an evaluation.
- 2 Go to the section and part it names.
- 3 Section 1 for pre-referral interventions and accommodations; Section 2 for baseline data and progress monitoring; Section 3 for letters and templates.
- 4 Open the guide (PDF, 71 pages) for the forms and letters.

WHAT YOU GET

Pre-referral menus, decision rules and graphs, and ready-to-use PST letters, notices, consent forms and logs.

Links to the Progress Monitor, the Data Sheet and the Progress Report Writer for the data work.

GOOD TO KNOW

- Use the student number from your key sheet, never a name or initials. The guide says the same.
- Plans are written with parents, not for them.
- A parent requests an evaluation? Start at Section 1, Part 2 and Section 3, Parts 5, 6, 10 and 11.

The Educator's Guide to Tiered Instruction

Your library

Dr. Long's guide to what Tier 1, 2 and 3 look like for academics and behavior, kindergarten through grade 12, and how data decide when a student needs more or less support.

WHERE TO FIND IT Your library on your toolkit dashboard → The Educator's Guide to Tiered Instruction

STEP BY STEP

- 1 Find your situation under "Where to start", such as a behavior concern or a parent asks about testing.
- 2 Go to the section and part it names.
- 3 Section 1 for the tiers; Section 2 for data and decisions; Section 3 for the law and special populations; Section 4 for working together.
- 4 Open the guide (PDF, 49 pages) for the worked example, the checklist and the glossary.

WHAT YOU GET

What each tier looks like, with intervention ideas, decision rules and a worked example.

Links to the tools the tiers depend on: Progress Monitor, Data Sheet, Progress Report Writer and Fidelity Log.

GOOD TO KNOW

- Tiers are a way to deliver help, never a way to sort children.
- A parent asks about testing, or you suspect a disability? Start at Section 3, Part 1.
- For team procedures, letters and forms, use the MTSS and Problem-Solving Team guide.

Red-flag flashcards

Your library

Eighteen statements teachers hear at school, each with the Same Team response. Fifteen also give the legal basis. Use them on your own, with a partner or in a PLC.

WHERE TO FIND IT The Teacher's Roadmap on your toolkit dashboard → step 6, Monitor → Red Flags flashcards. Also from The teacher's guide → Red flags.

STEP BY STEP

- 1 Read the red flag and say how you would respond.
- 2 Select **Turn over** to see the Same Team response, and the legal basis where there is one.
- 3 Select **Next** → for the next card, or **Shuffle** to mix them.
- 4 In a group: each person answers in a sentence or two, then turn the card over, compare, and talk about when you have heard it.

WHAT YOU GET

Eighteen practice cards on screen.

A printable set (PDF): print pages 2–11 double-sided, flipping on the long edge, so each response lands behind its red flag.

GOOD TO KNOW

- The goal is a better question and a clearer next step for the student, not a gotcha.
- The legal bases are federal; check your state's rules too.
- No student data on these cards.

ONE LAST THING

Same team, same reading of the IEP.

The school tools use the same math as the free Same Team family tools. When a family checks progress, services or a score at home, their numbers and yours match.

Want it at your school?

See the plans on the Same Team Schools page.

Questions?

info@sameteameducationalresources.com