MADISON METROPOLITAN SCHOOL DISTRICT

DEPARTMENT OF EDUCATIONAL SERVICES
Office of Special Education and Section 504

STAFF HANDBOOK

AUGUST, 2013

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## STAFF DIRECTORY

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<thead>
<tr>
<th>Administrative Team</th>
<th>Clerical</th>
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<tbody>
<tr>
<td>Joanne Grassman, Assistant Director, Memorial Area Schools</td>
<td>Julie Leser</td>
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<tr>
<td>Jim Haessly, Assistant Director, Memorial Area Schools</td>
<td>Sondra Corbett-Wood</td>
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<tr>
<td>John Harper, Executive Director</td>
<td>Christine Tormey</td>
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<tr>
<td>Noelle Sapiro, Assistant Director, East Area Schools</td>
<td>Theresa Grueneberg</td>
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<tr>
<td>Ted Szalkowski, Assistant Director, La Follette Area Schools</td>
<td>Julie Leser</td>
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<tr>
<td>Scott Zimmerman, Director of Early &amp; Extended Learning</td>
<td>Kristen Nickelatti</td>
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<tr>
<td>Addamo, Sue – Doyle (EC/OT/PT)</td>
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<td>Steinmann, Wendy – Cherokee/Memorial HS/West HS</td>
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<td>McGee, Sarah – Doyle (Technology)</td>
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<td>McGraw, Zoe – Memorial HS</td>
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</table>
LEAP – East Program Staff (Marquette Elementary School)
Katie Julka (CC)
Casey Miller (CC)
Jennifer Quisler (SEA)
Catherine Stanford (SEA)
Carol Van Handel (Recreational Therapist)

LEAP – West Program Staff (Randall Elementary School)
Carrie Bolack (CC)
Kristie Hoeth (SEA)
Carol Van Handel (Recreational Therapist)
Carol Weiss (CC)
Vacancy (SEA)

NEON Program Staff – East (East Madison Community Center)
Bruce Bobb (CC)
Carleen Jorgensen (SEA)
Meg Nelson (SW)
DeEtte Shanklin (CC)
Vacancy (SEA)

NEON Program Staff – West (Hoyt)
Steven Adams (SEA)
Michael Balisle (SEA)
Kathy Brandt (CC)
Meg Nelson (SW)
Richard Raith (CC)

School Based Alternative – East (Black Hawk Middle School)
Marty Kral (SEA)
Patrick Lazzaro (CC)
Jordan Scott (SEA)
Vacancy (SW)

School Based Alternative – West (Cherokee Middle School)
Darnetta Carter (SEA)
Andrew Tonies (CC)
Vacancy (SW)
### PHONE DIRECTORY

**2013-14**  
**General Fax – 204-0349**  
**IDEA Referral Fax Only – 204-0571**

For specific e-mail addresses see the address book on the District’s home page.

<table>
<thead>
<tr>
<th>Name</th>
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PROFESSIONAL DEVELOPMENT AND LEARNING (PDL) REQUESTS

School staff has the opportunity to participate in professional development and learning activities. Please follow the guidelines below:

**Submitting a Proposal**
Staff wishing to propose professional development and learning activities must work with their building principal to determine how this request aligns with school, district, or department priorities. The principal will need to support this request and submit it to the appropriate attendance area assistant director, special education. Forms are available on the district website.

**Request to Participate in Out of District Professional Development Activity**

- **All** requests should be submitted in writing (using an “Out of District Professional Activity Request” form) as early as possible, but no less than 3 weeks prior to the conference date, to the appropriate secretary and/or administrator. A brochure or description of the conference must be attached to each request. Approval is not given until an administrator has signed off on the “Out of District Professional Activity Request” form and it is returned to the person who made the request.

- For all requests, prepayment by the staff member is required for all costs. Pre-payment of travel expenses may be reviewed on a case-by-case basis. **Itemized receipts must be retained for reimbursement on approved costs (e.g. registration, hotel, travel), along with a completed reimbursement form.** Educational Services general guidelines for reimbursement for conferences is: $100.00 for in-state conferences and $200.00 for out-of-state conferences. Requests for additional reimbursement will be reviewed on a case-by-case basis. All conference requests will be reviewed to ensure alignment with professional roles of the requestor. In addition, conference requests must relate to District strategic priorities and Department priorities.

- Food/meal reimbursement is considered on a case-by-case basis, provided funds are available. District guidelines for food reimbursement are: $34.00 a day for in-state conference travel and $40.00 a day for out-of-state conference travel. **Itemized receipts must be retained for reimbursement on approved costs (e.g. registration, hotel, travel), along with a completed reimbursement form.**

- If a substitute is being requested, it is the responsibility of the staff member who is making the conference request, to make sure that the sub calendar is not closed for the date(s) of the conference attendance. The staff member must work with their building secretary to request a sub.
PURCHASING INFORMATION AND PROCEDURES

Authority to purchase on behalf of the Madison Board of Education has been granted solely to the Director of Purchasing and Administrative Services by the Board of Education Policy #6244. Authorization to purchase in amounts of $25.00 or less are provided in the Petty Cash Policy #6318 (http://boeweb.madison.k12.wi.us/policies/6318).

Madison Metropolitan School District personnel are not authorized to make purchases involving Board of Education funds without using proper requisitioning and purchasing card procedures, except where provided by Petty Cash procedures.

**Petty Cash Procedures**

School offices do not have petty cash funds to reimburse staff for authorized purchases. Any requests for reimbursement need to be made directly with the Educational Services office.

1) Prior to making a purchase, obtain a “Wisconsin State Sales Tax Exemption Authorization” form #100410 signed by your principal or program administrator. This form will enable you to purchase items in an amount not to exceed $25.00 per transaction. The purchase will be exempt from State Sales Tax because the materials are for school use. Staff members will not be reimbursed for sales tax paid.

2) The intent of Petty Cash purchases is that only one purchase per day may be made at individual vendors. Multiple purchases per day at individual vendors to circumvent the petty cash policy will not be reimbursed.

3) The only exception to the $25.00 rule is for food for classroom use.

4) Only original receipts may be presented for reimbursement. Hand written notes or photo copies will not be accepted.

5) Receipts must identify items purchased.

6) As soon as possible after a Petty Cash purchase, present the receipt to the Educational Services Department office for reimbursement with a blue “Direct Pay” reimbursement form, signed by your Building Principal. Petty cash receipts should not be held and turned in at the end of the month or school year for reimbursement. If the school has used all of its special education budget, reimbursement may not be able to be made.

**Standards**

District standards have been developed for numerous categories of equipment and supplies. Purchasing Services monitors all requisitions involving these categories to ensure that these standards are maintained. Standards have been developed for the items such as Audio-Visual Equipment, Computer Technology, and Office Equipment.

Standards on items listed above are maintained by Purchasing and Administrative Services and can be found on the district web site.
Procedure to Use for Processing Requisitions – Special Education

The “Internal Requisition Request” form must be completed with all identifying information. Handwritten notes/orders will be returned for submission on the proper form. The requisition(s) will then need to be approved by your building principal/administrator. This approval indicates that this request falls within the amount your building has been allotted to support special education programs in your school. For low incidence (HI itinerant, VI) and itinerant staff (OT/PT, Speech/Language), approval by the building principal affirms the appropriateness of this purchase. Only special education staff are authorized to make purchases against the special education budget. Requests from regular education staff will not be approved.

Once the requisition is completed and approval has been obtained, the requisition should be forwarded to the appropriate program Assistant Director/secretary for approval and processing. Central Office staff will work with Purchasing to have a purchase order issued. Note that all freight charges will be charged against the school or individual staff budget. For budgeting purposes, you can estimate these charges at 10% of the total cost of your order.

**Hand-held electronic devices require DPI approval prior to ordering.** When submitting such an order, please include rationale for the devices use. **Purchasing cards CANNOT be used to order hand-held electronic devices.**

**Purchasing Cards**

The District makes Purchasing cards available for staff use. Each school has been provided with a purchasing card for cross categorical teachers, early childhood teachers, deaf/hard of hearing teachers, speech/language clinicians, and occupational/physical therapists. Itinerant special education staff (EC, HI, OT/PT and VI) will also have access to a purchasing card at their school base. Staff will need to work with the school’s Site Coordinator regarding established guidelines for checking out the card. **Purchasing cards CANNOT be used to purchase Apple gift cards.**
PURCHASING – “HOW TO’S”

All ordering is done on one form called the INTERNAL REQUISITION REQUEST. This form may be typewritten or handwritten as long as it is legible. Orders that are not legible or complete will be returned.

It is very important that all necessary areas of the Internal Requisition Request be completed.

1) Complete all identifying information in the upper left hand corner of the requisition form, i.e., school, program, name, room number, date. If this information is missing on the Internal Requisition Request when it is received in the Central Office, it will be returned to the submitting staff person for correction or completion.

2) All hand held electronics require DPI approval prior to ordering. When submitting such an order, please include rationale for the devices use.

3) Requisitions should contain items from only one vendor.

4) Supply the vendor’s name and address. Only one vendor per requisition.

5) It is not necessary to fill in the Fund-Location Code, Requisition Number, or Budget Accounts to be Charged area when a Educational Services budget is being charged. Central Office staff will complete this information.

6) Be sure to include the unit and price each.

7) All requisitions must have the principal’s signature. This will ensure that funding is being supported through the school’s Educational Services budget. It should then be forwarded to the appropriate program Assistant Director/secretary for processing.

8) If an order seems unduly delayed, you or your school secretary can check the status by calling the Purchasing Department.

9) When you receive your order, remove the packing slip, and verify that all items have been received as ordered. If your order is not correct and the packing slip does not indicate a back order, call Purchasing to report it.
STAFF TECHNOLOGY

Staff Productivity Workstations-Special Education
Originally, through agreements with MTI and the MMSD concerning the need to computerize IEPs, schools were furnished with computers to support special education and student services staff (teachers, clinicians, therapists, psychologists, social workers and nurses) productivity. Over the years, we have gradually increased the number of computers at schools so that our ratio of staff to computers is now almost one-to-one. That initiative continues to be carried forward with yearly review of workstation placement to accommodate changing staffing levels. Additionally, in an effort to keep workstations usable with the current software, a review is conducted annually to assure they can handle all the needs of today’s work demand. Our current goal is to replace workstations every 5 years, budget permitting. Printing needs are also considered and reviewed on a regular basis to assure needs are being met. Selected schools continue to use specialized computer equipment to present the annual IEP at team meetings with parents present. This technology, combined with the use of the eIDEA system enhances the IDEA process by enabling staff to complete all paperwork at the final meeting.

These workstations are provided for the purpose of assisting staff to complete IEP related products, to communicate effectively through the use of email and to support instruction through the development of instructional materials, etc. These workstations are not assigned to individual staff but rather are placed where they are accessible to any special education staff who needs them throughout the day. This is especially important for district level and itinerant special education staff who may visit schools and need access to a workstation to complete their work.

Anytime these workstations are not needed for the purposes listed above and the workstation is located in an instructional area of the school (classroom) where supervised student use could occur, their use with students is acceptable. When students use computers, they should be accessing only server-based software; that is, software that does not need to be installed on the individual computer. Software installed on a local computer can often interfere with the operating system of that computer, causing conflicts with all other programs resulting in the needed teacher productivity software becoming unstable or inoperable. Please remember that this student use continues to be secondary to the primary function of these workstations, that is, staff productivity.

Any exceptions to the use of teacher workstations as outlined above will require the approval of your special education Assistant Director in cooperation with your principal.

Computerized Programming to Address Productivity
In 1999, the eIDEA system was created to address the completion of documents required by IDEA. It has been updated as needed to reflect changes in the law and to address additional requirements put forth by DPI (e.g. promotion criteria). Additionally, many components have been added to assist staff in their management of IDEA paperwork, as well as managing their student caseload. These many components have been presented in a graphically user-friendly format utilizing the OMEGA/AS400 student system. Many staff refer to this system as the “GUI” system, derived from the technical name-GUI400. The many systems contained within the GUI400 include:
The eIDEA system (Referral, Evaluation, Programming and Other forms).

Special Education Teacher-Student Management with 5 components:

- Student listing showing due dates for the annual IEP and reevaluation along with identification of case manager and IEP chairperson;
- A listing of those student’s specialized transportation needs;
- A listing of S/L students and their severity assignment;
- A listing of students in the staff member’s assigned schools that will have transition needs during the spring term (SMAL);
- A listing of students in the staff member’s assigned schools that will be entering in the next school year.
- Promotion – 4th
- Promotion – 8th

ESY Progress: A system allowing staff to report the progress made during the ESY period.

Special Education Activity Logging System: A system to capture time spent with students for which the district may receive reimbursement.

- Request to Add Transfer Student
- High Cost Students for Schools
- Indicator 7 Exit Report – Staff
- OT/PT Reports

These systems have many additional components that allow administrators to manage and assign staff in an electronic format as well. Yearly, each system is reviewed to assure compliance with current IDEA policies and to adjust for staff needs and ease of use.
TRAVEL REIMBURSEMENT

The school district reimburses professionals for mileage traveled on official school business including home visits. However, it is the professional’s responsibility to provide, at his own expense, transportation to and from home. Itinerant personnel will be reimbursed for travel between schools in the course of the day (starting when you leave the first school you attend on any particular day and ending at your last school). Staff are not reimbursed for mileage to and from their home.

Procedure to follow for reimbursement:

1. Complete the Mileage Reimbursement Form, list each destination by name and in the sequence per day, record the mileage for each destination, and give the total daily mileage in the right-hand column. This form is available electronically in excel format that provides drop down menus of District locations and auto-fills the mileage between District locations, automatic calculation of total miles submitted and automatic calculation of total amount requested. Forward the completed form to your program administrator. If an individual recording of each day’s individual trips is not made, the request will be returned for completion. Staff traveling between District buildings should use the District’s mileage chart. Both the Mileage Reimbursement Form and the mileage chart can be found on the District’s Business Services website at https://bpaweb.madison.k12.wi.us/mileage.

2. Forms should be submitted at the end of every month. DO NOT hold mileage reimbursement requests for an entire semester or year. This makes it difficult for reviewing the budget process.

3. Reimbursement requests are processed in a timely manner after they are received. Please do not contact our office regarding the status of your reimbursement unless it seems unduly delayed, i.e., reimbursement has not been received within one month of submission of your reimbursement request.

Out of City Mileage

Since Madison serves as a regional center for the hearing impaired and the visually impaired, in the course of the IEP process, some special education staff members may need to travel out of Madison to attend staffing meetings, make home visits, visit home schools, or visit institutions. When staff will be traveling out of the City, they must complete an “Out of District Professional Activity Request” form describing the travel. Mileage should be figured from point of departure, i.e., school building or home to destination and back. The destination should include name of school or agency or street address of home visit. Mileage claimed for reimbursement should be done on an “Expense Statement” form and forwarded to their program administrator. Out of City Mileage should not be claimed with local mileage.
BOARD OF EDUCATION POLICY

Board of Education policy has been developed and must be adhered to. The following BOE policies are especially relevant and should be reviewed:

- Administering Medication (4113) (https://boeweb.madison.k12.wi.us/policies/4113)
- Field Trips (3350) (https://boeweb.madison.k12.wi.us/policies/3350)
- Liability Insurance (8350) (https://boeweb.madison.k12.wi.us/policies/8350)
- Safety (4147) (https://boeweb.madison.k12.wi.us/policies/4147)
- Student Records/Confidentiality (4150) (https://boeweb.madison.k12.wi.us/policies/4150)
- Student Records/Definitions (4151) (https://boeweb.madison.k12.wi.us/policies/4151)
- Pupils-Employees/Safety (4147) (https://boeweb.madison.k12.wi.us/policies/4147)
CELLULAR PHONE USE

Personnel with district-paid cellular phone service should follow the same standard as for regular telephone use and use the cell phone only for approved business calls. Cellular phones are provided to staff due to student need, not for convenience in making routine phone calls. The basic cell phone and any additional airtime charges are made to the appropriate school’s special education budget.

REQUIREMENT FOR CHILD FIND PRESCHOOL SCREENING AND REFERRAL FOR IEP EVALUATION

Wisconsin Statute 115.777(1)(b) regarding referral to screening of preschool-aged children who have a suspected disability states:

Section 115.777(1)(b) A person who is required to be licensed under s.115.28(7), who is employed by a local educational agency and who reasonably believes a child has a disability, shall refer the child to the local educational agency.

This means all MMSD staff who are licensed under s.115.28(7) must receive the following information at least annually:

If a licensed staff member becomes aware of a child between the ages of 3 and 5 years who is not yet enrolled in kindergarten and who may have a disability, the staff member is required by law to refer the child to the local educational agency (MMSD).

In this District, this is accomplished by contacting CHILD FIND PRESCHOOL SCREENING at 663-8471.
GUIDELINES FOR OBTAINING AND USING PATIENT HEALTH CARE (PHC) RECORDS

School district staff may need to review records from hospitals, physicians and other health care professionals in order to understand a student’s health status and its impact on learning, or to determine if a student meets criteria for a specific disability. The Health Insurance Portability and Accountability Act (HIPPA) confers rights to individuals regarding their personally identifiable health information which is contained in Patient Health Care Records. All providers subject to HIPAA were required to fully implement privacy and security rules by April 13, 2003. Educational records are not subject to HIPPA rules but are governed by the provisions in the Family Educational Rights and Privacy Act (FERPA).

The following are key points related to the use of Patient Health Care (PCH) records:

What are Patient Health Care Records (PHC)?
- Created by physicians and other health care providers including but not limited to those listed below who are licensed or certified by the Wisconsin Department of Regulations and Licensing Board for specific professions:
  - Acupuncturists
  - Athletic Trainers
  - Audiologists
  - Chiropractors
  - Dentists
  - Dietitians
  - Nurses
  - Occupational Therapists
  - Optometrists
  - Pharmacists
  - Physical Therapists
  - Psychologists
  - Social Workers
  - Speech Language Pathologist
- Defined by state law (Wisconsin State Statute, Ch 141.81-86) which delineates rules for access and confidentiality
- Are NOT educational records
- Cannot be placed in school files unless authorized in writing by the parent or guardian on the MMSD Authorization to Obtain or Release Patient Health Care (PHC) Records
- Cannot be copied
- Can only be released with informed consent of parent/legal guardian
- Cannot be given to a professional (school or community) other than the professional identified on the request form
- Are protected by the Health Insurance Portability and Accountability Act (HIPPA) privacy and security rules

How Do You Obtain Patient Health Care Records?
- Use the Authorization to Obtain or Release Patient Health Care (PHC) Records form (revised January 2012, #101370) to request PHC records from physicians and other health care providers. The Authorization to Obtain or Release Patient Health Care (PHC) Records form is HIPAA compliant.
- Obtain copies of the Authorization to Obtain or Release Patient Health Care (PHC) Records form from either the MMSD Central Stores or alternatively, print a copy from the Department of Student Services website at https://stusvcweb.madison.k12.wi.us/node/104.
- This form is available in Spanish and Hmong.
• Be as specific as possible when naming the person to whom the records will be released. Include the purpose for obtaining/releasing records and the type of information to be disclosed.

• **Do not use** the Parent Permission to Obtain or Release Records/Information form (#102030) to request PHC records.

**Who Reviews Patient Health Care Records?**

• PHC records are reviewed by a school professional from the same discipline as the professional who created the records, or a school professional with the necessary expertise.

• Generally, school nurses review medical records (PHC records from a doctor or nurse).

• If medical records are related to mental health, a professional other than the school nurse can review the records.

• If PHC records are more educational in nature, the IEP team decides which professional has the expertise to review and interpret the records.

**How Do You Summarize/Dispose of Patient Health Care Records?**

• Information in the PHC records is summarized by the reviewing MMSD professional on the appropriate IEP form or using another format.

• The original PHC records must be destroyed unless the parent has authorized in writing retention of the patient health care records in the student behavioral file.

• Violations of the HIPAA privacy rules may result in substantial fines.
INSTRUCTIONAL TRAVEL

To assure adequate budget support for and confirmation of instructional travel objectives, all requests for instructional travel (extension of your educational program beyond the school grounds) MUST be approved in advance by your Program Administrator and follow the procedures indicated below. Avoid commitment to students until you have such approval. Support for instructional travel that is part of a child’s IEP must be coordinated/approved following these same procedures. Invoices received for instructional travel that have not been approved using this process will be returned to the school for payment, and if necessary, your school’s supplies/materials budget will be charged.

Remember that physical disability is not itself a reason for any student not participating in an activity. Appropriate educational opportunity for activities that are equal to or as effective as that provided to others must be provided.

Procedures to follow to secure funding/permission:

- Work with your principal to complete the Request for Additional Budget Support (Funds) – Instructional Travel form which can be found on the district wide web at https://specialedweb.madison.k12.wi.us/specedforms. This request will need to contain an estimate of the cost of planned trips. After this form has been completed, it must be submitted to the appropriate area/level special education Assistant Director for approval of funds. You will be notified of approval after this request has been approved.

- At this time, formal reservations can be made.

- If an invoice for transportation is received in our office, and the above forms have not been received and approved, it will be returned to the school for payment, and if necessary, your school’s instructional materials/supplies funds will be used to make payment of the invoice.

- The procedure for accessing the YMCA facility when the IEP team has determined that a student should receive instruction at the YMCA continues. To access the instructions and Request for YMCA Student Membership form can be found out https://specialedweb.madison.k12.wi.us/specedforms.
MAKING COPIES OF BEHAVIORAL RECORDS OF STUDENTS IN SPECIAL EDUCATION PROGRAMS FOR PARENTS/ELIGIBLE STUDENTS

Board of Education Policy 4153 states, “Parents of students and eligible students may inspect and review the student’s educational record upon request.”

Procedure 4153 (3) states: “Student behavioral records shall be open for inspection only in the presence of District personnel qualified to explain or interpret such records. The Custodian of the Records shall make the necessary arrangements.

   a. Copies of the student's behavioral records will be provided only after they have been reviewed in the presence of District personnel qualified to explain or interpret such records.”

Behavioral records of non-special education students may be copied at the school after they have been explained and interpreted by a qualified individual and given directly to the parent. Be sure to mark that the parents or eligible students were provided with copies so if a second request is made, the fee of 25 cents per page can be assessed.

ACCESSING SPECIAL EDUCATION STUDENT RECORDS AT THE SPECIAL EDUCATION CENTRAL OFFICE

The Central Office student special education records are electronically stored in the electronic document management system FORTIS. To access an active or inactive special education student record please see the special education records manager.
STUDENT TRANSPORTATION INFORMATION

1. For a student to receive transportation as a related service, IT MUST BE STATED IN THE STUDENT’S IEP. When possible, students attending an elementary school living less than 1.5 miles should walk or ride the yellow bus if one is available. Middle and high school students should access city transit if applicable. The transportation form will not be processed until the IEP is finalized in the eIDEA system. If transportation is required prior to finalizing the IEP in the eIDEA system you must contact your Special Education Assistant Director. If the student is attending an MMSD school other than his school of residence you MUST contact the special education Assistant Director.

2. The MMSD Transportation Department DOES NOT make arrangements or pay for field trips, swimming at Lapham, trips to the Planetarium, etc. You must make these arrangements yourself. If you have questions, please talk to your principal or Special Education administrator. MMSD Transportation is responsible for only two rides per day (home to school and school to home). All other rides should go through the Department of Educational Services, Office of Special Education, using the Instructional Travel Request process.

3. If a student becomes ILL during the school day, contact the parent or legal guardian to pick up the student or see if a school staff person (psychologist, nurse, principal, counselor, etc.) can take the student home. If there is no alternative, contact the Transportation Department to request a ride. They will need the name, address, and phone number of the person who will receive the student. If your school has a fund that would pay the cost of transportation home for a regular education student in this situation, the same fund should be used to support the special education student.

4. When the IEP is finalized, it takes 1 business day for the Special Education records manager to verify the IEP. If Transportation is listed as a related service, the transportation information is sent to the Transportation Department. The Transportation Department then requires a minimum of 3 business days to implement the request.

5. Changes in details of transportation, such as address change, time of pick-up, etc. are made through the case manager’s Student Management System in GUI. Please see Implementation Memo #8: “Specialized Transportation” for instructions (http://dww.madison.k12.wi.us/es/SpecEd/idea/bul_memo.htm). Staff are NOT to call the Transportation Department or the bus company directly.

6. School staff must meet the special education vehicle and assist in loading and unloading.

7. If you have questions, call your Special Education Assistant Director, Christine Tormey (663-8480), or the Transportation Department (663-5288).