

Re: Steps for "Closing" a Student File  
Date: 9/09/2005

### Steps for "Closing" a Student File

If a student moves out of the district or closes out of services during the school year please follow these steps to assure a timely "Closing" process:

- \_\_\_1. The Primary case manager will notify all related service providers that the student has moved or is no longer receiving special education services.
- \_\_\_2. All services providers must update the progress note for the student even if he/she was served for only a portion of the 9 weeks or trimester.

**The Case manager will then:**

- \_\_\_3. In WebKidss print off all of the student's progress notes written since the last IEP.
- \_\_\_4. In WebKidss in the DATES section change the Ed status code. **These codes are in your data dictionary.** The most common codes will be **T- Transferred** moved KNOWN to continue at a different school (we must have proof of request of records to use this code), **L- left state**, **O-objectives**/benchmarks completed, **D-dropped**, or **U-Unknown** moved without evidence of continuing at any other school, and **G-Graduated** with a diploma.
- \_\_\_5. Enter the exit date (last day of attendance). This will automatically shorten the weeks of services on the anticipated services chart to reflect those that our Cooperative has provided to the student.
- \_\_\_6. Print off a new Teacher Information Page that reflects these changes.
- \_\_\_7. Include a copy of the building attendance record and any requests for information from the student's new district (if available). For those students who exit but remain in the district inform building secretaries of this change so students can be correctly coded as NON SpEd in their building reports.
- \_\_\_8. **Send the teacher file containing all the above (plus any other documentation that occurred since the last AIMS packet was sent in (i.e. staffing notes, meeting notices, testing or parent contacts, etc) to the MIS coordinator within 10 days of the student's last day of attendance. This will allow the student to be exited and archived from your student list in WebKidss.**