

BCeSIS

Supporting Student Achievement

Student Services – Full **Team Meetings** Reference Guide

Version 1.2
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Introduction

Teams need to be set up before you can begin to use this function to record Team Meetings. At the time the Teams are set up, the core members of the team, including the team chair can be added and will then appear each time you use that team for a meeting. In this reference guide we are going to use the School Based Team meeting as an example. The format is the same for all meetings, but the outcomes of the review processes may differ.

It is important to note that for Student Services Full there are two methods of storing historical information. One creates records for the student and this stays with the student (Reviews, IEPs, Assessments, etc.) The second creates a record for the school or district and this information remains with the school or district even when the student moves to another district. The school/district historical information is captured through the Team meetings.

Note: This function may not be able to accommodate all school and district practices related to meetings. It was created based on Policy for School Based Teams and practices related to screening, where teams are created with a static base of personnel for any given year who perform very specific functions of Student Review. Where schools or districts create teams for each individual student, they will need to determine an alternative format or program for this practice as this module was not created with this practice in mind.

FOIPPA notification

The data displayed in the screen shots of this document is from a test environment. Although the district and school names are real, all other information (students, parents, teachers, etc.) is scrambled in accordance with the protection of individual information.

Creating a School Based Team (SBT) Meeting

Main Menu > Team Meetings

Team Type: School-based team
 District: Nicola-Similkameen
 School: Merritt Secondary

Requery

Review Team	Date	Status	General Notes
Merritt Secondary SBT	? 07-NOV-2007 12:51 PM	Open	
Merritt Secondary SBT	? 24-OCT-2007 02:27 PM	Open	
Merritt Secondary SBT	? 24-OCT-2007 01:30 PM	Open	
Merritt Secondary SBT	? 24-oct-2007 01:18 PM	Open	
Merritt Secondary SBT	? 24-OCT-2007 12:54 PM	Open	
Merritt Secondary SBT	? 10-OCT-2007 11:54 AM	Open	
Merritt Secondary SBT	? 09-OCT-2007 03:08 PM	Open	Three students were referred to the SBT and the follo
	?		
	?		
	?		
	?		
	?		

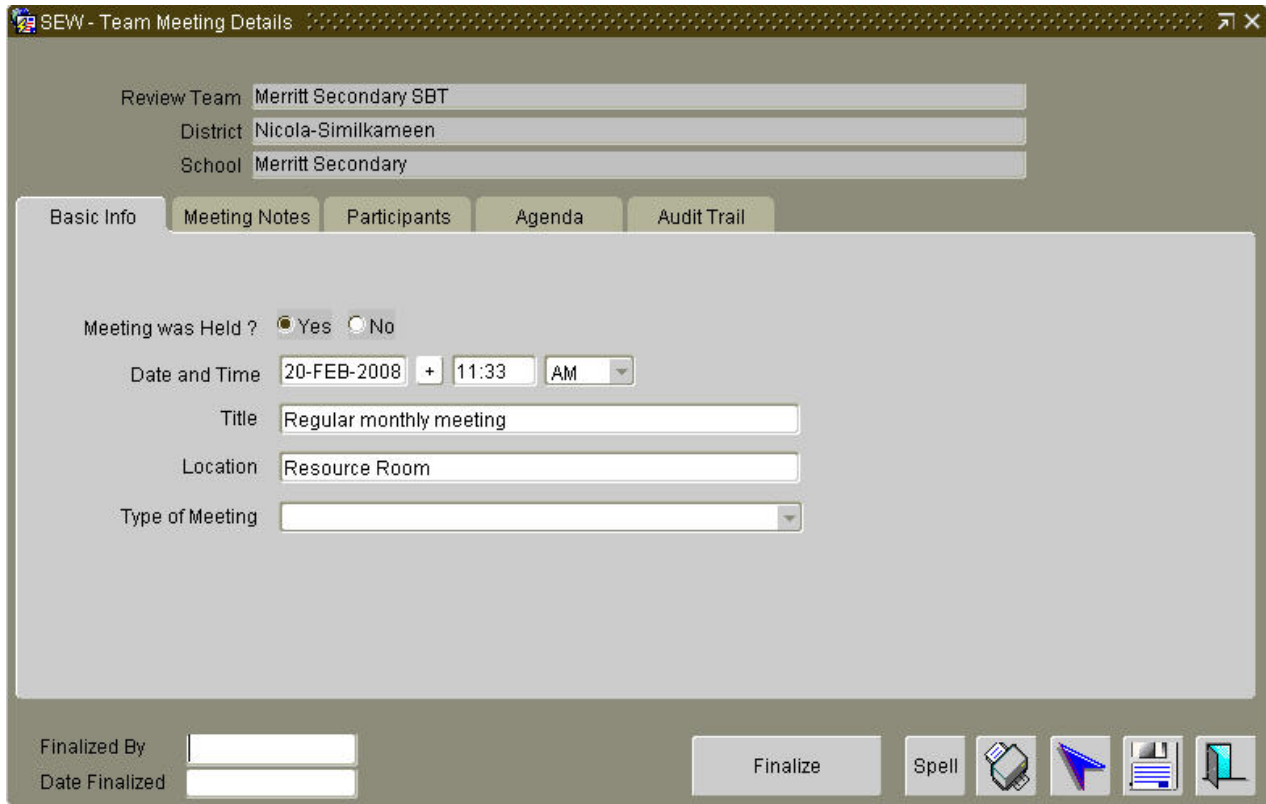
Add Delete View/Modify

It is necessary to create a new meeting for each time your SBT or other team will meet. This creates an historical record of all meeting information. The use of the meeting function enables the school to keep a record of all meetings held, the students that were processed at those meetings, and summaries of the decisions made. When a student changes schools, the information in Student Services which is attached to the student (e.g. IEP, Student Review, Referral, etc.), stays with the student. However, the Team Meeting information belongs to the school and remains with the school creating a history of Student Services processes.

Note: Meetings cannot be deleted, even though the Delete button appears on the screen.

The Team Meetings screen allows you to all meetings to date. Based on security, this is the source for historical meeting information and any of the meetings can be viewed. This is also the screen that is accessed to add a new meeting.

1.1 Basic Info Tab



The screenshot shows a web application window titled "SEW - Team Meeting Details". At the top, there are three text input fields: "Review Team" with the value "Merritt Secondary SBT", "District" with "Nicola-Similkameen", and "School" with "Merritt Secondary". Below these is a tabbed interface with five tabs: "Basic Info" (selected), "Meeting Notes", "Participants", "Agenda", and "Audit Trail". The "Basic Info" tab contains the following fields:

- "Meeting was Held ?" with radio buttons for "Yes" (selected) and "No".
- "Date and Time" with a date field "20-FEB-2008", a "+" button, a time field "11:33", and a dropdown menu set to "AM".
- "Title" with a text input field containing "Regular monthly meeting".
- "Location" with a text input field containing "Resource Room".
- "Type of Meeting" with a dropdown menu.

At the bottom of the window, there are two text input fields labeled "Finalized By" and "Date Finalized". To the right of these fields are four buttons: "Finalize", "Spell", a printer icon, and a mouse cursor icon.

This first screen will appear when you **View/Modify** a new meeting. If one or more students have been referred, you will get a message box indicating that students have been added to the agenda, through referral, for this meeting (see screen shot below).

The other information on this Basic screen provides more detailed information on the date and location of the meeting. A drop down menu is also on this first screen which requires that the user select the **Type of Meeting** (in addition to this being a School Based Team meeting). The generic "Team Meeting" will be available in this menu to cover meetings that meet a variety of needs. If the meeting is specific to certain students, requires interagency involvement for all these students, and does not cover additional requirements for other students, that choice will be available in this menu. However, when the meeting is covering a variety of needs and Interagency is one of them, see the section on Meeting Notes for one possibility on how to create a record of that. The field **Type of Meeting** can provide valuable information for the school and for covering a Special Education Audit.

Student Services – Team Meetings Reference Guide

SEW - Team Meeting Details

Review Team

District

School

Basic Info Meeting Notes Participants Agenda Audit Trail

Meeting was Held ? Yes No

Date and Time + AM

Title

Location

Type of Meeting

Message

5 student(s) was/were added to the agenda because they have new referrals.

OK

Finalized By

Date Finalized

Finalize Spell

If one or more students have been referred, the message box above will display when you first open the meeting record.

1.2 Participants Tab

SEW - Team Meeting Details

Review Team: Merritt Secondary SBT
 District: Nicola-Similkameen
 School: Merritt Secondary

Basic Info | Meeting Notes | **Participants** | Agenda | Audit Trail

Participant Name	Position
Casey, Nymark 58044	Vice Principal
Annabelle, Lopez 20072	Teacher
Dolly, Ruitenbeek 20095	Teacher
Brigitta, Helal 20103	Teacher

Add Del

Finalized By: _____
 Date Finalized: _____

Finalize Spell [Printer] [Mouse] [List] [Screen]

The Participants screen is auto-populated with members of the School Based Team (see Reference on creating Teams). If additional personnel are involved with one or more of the students for this meeting, click **Add** and select them from list that appears or type them in – if external participants (e.g. inter-agency personnel)

If a member of the Team is not present for the meeting, use the **Delete** button to remove that person.

1.3 Agenda Tab

Review Team: Merritt Secondary SBT
 District: Nicola-Similkameen
 School: Merritt Secondary

Basic Info | Meeting Notes | Participants | **Agenda** | Audit Trail

Pupil Number	Name	Referral Date	Referral Notes / Relevant Information
218157	Manson, Gerry	20-FEB-2008	Student moved from another district with a
218732	Albu, Nina	10-OCT-2007	Nina is having problems with written comm
218742	Avril, Ramanjit	24-OCT-2007	Raman is unable to complete any exercise
222956	Buchanan, Tim	09-OCT-2007	Tim has difficulty hearing lesson informati
536992	Akbar, Cory	24-OCT-2007	Is very shy

Buttons: Add (circled in red), Del, View Details

Finalized By:
 Date Finalized:

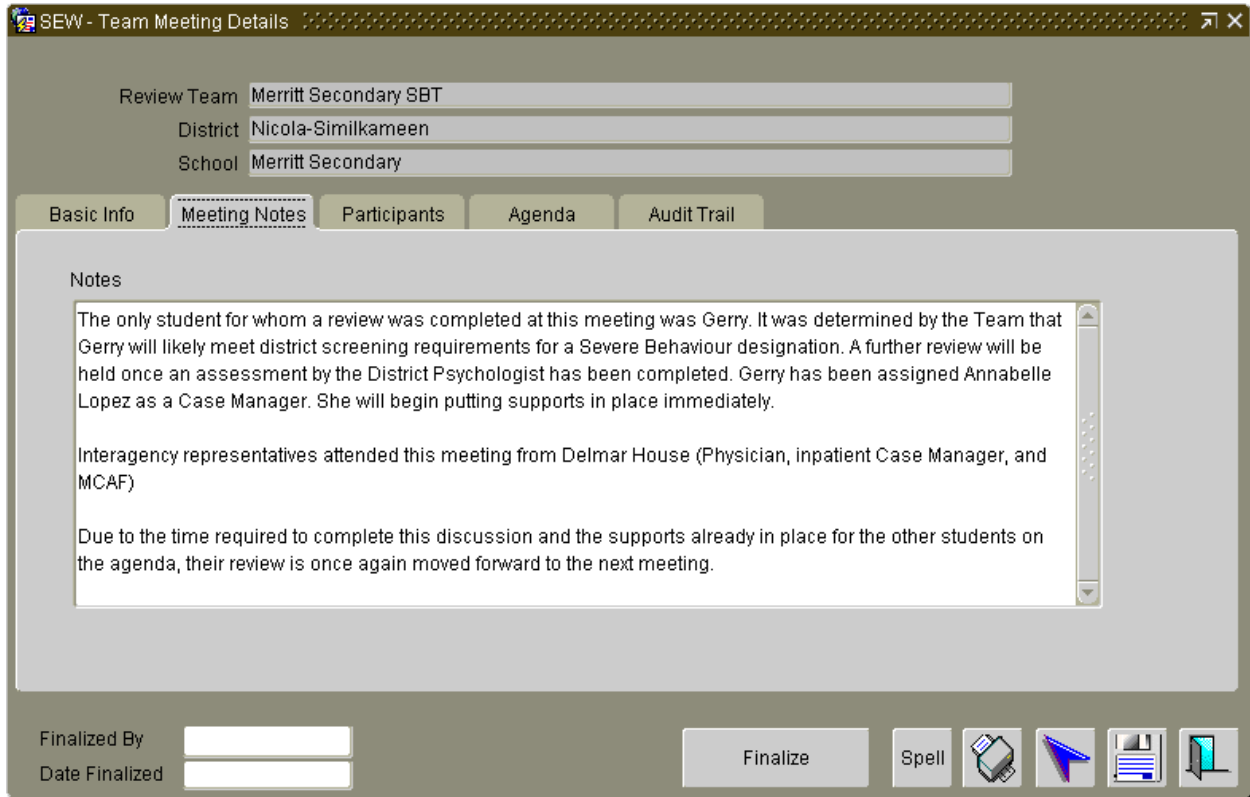
Finalize | Spell | | | |

All students that have been put on this agenda through the referral process will appear here with a brief summary of referral information. By selecting the student from this agenda, you can initiate the Student Review process for each student. The student will continue to appear in Bold on this agenda until the Student Review has been completed and finalized.

Many School Based Teams have limited time for meeting each week, month, or ad hoc. They may not, therefore, wish to have students continue to appear on the agenda from meeting to meeting until the team is able to complete the review for the student (see example on the agenda above of students carried all the way forward from October if not addressed). An alternative to referral for placing a student on the agenda of a School Based Team meeting is to **Add** the student to the agenda during the meeting. This would allow the team to complete the review for that student and then add another and so on as time permits.

It is also possible to add students to the agenda during the meeting that may have been submitted too late for the electronic referral. Likewise, if there are no referrals for a regularly scheduled meeting, a student or students can be added during the meeting that have been brought to the attention of SBT members as requiring consideration.

1.4 Meeting Notes Tab



The screenshot shows a web application window titled "SEW - Team Meeting Details". At the top, there are three input fields: "Review Team" with the value "Merritt Secondary SBT", "District" with "Nicola-Similkameen", and "School" with "Merritt Secondary". Below these is a tabbed interface with five tabs: "Basic Info", "Meeting Notes" (which is selected), "Participants", "Agenda", and "Audit Trail". The "Meeting Notes" tab contains a text area with the following text:

Notes

The only student for whom a review was completed at this meeting was Gerry. It was determined by the Team that Gerry will likely meet district screening requirements for a Severe Behaviour designation. A further review will be held once an assessment by the District Psychologist has been completed. Gerry has been assigned Annabelle Lopez as a Case Manager. She will begin putting supports in place immediately.

Interagency representatives attended this meeting from Delmar House (Physician, inpatient Case Manager, and MCAF)

Due to the time required to complete this discussion and the supports already in place for the other students on the agenda, their review is once again moved forward to the next meeting.

At the bottom of the window, there are two input fields labeled "Finalized By" and "Date Finalized", a "Finalize" button, a "Spell" button, and several icons for printing, navigation, and help.

These become the history for the school of the decisions made at this meeting and the students discussed. A student may have been referred to Student Services and the team decides through information and discussion at the meeting that there is no further action required by Student Services. This information can be very valuable should the occasion arise where the decision is challenged. It also provides a valuable history should the student be referred again with additional information. It also creates a valuable historical record for the school, that remains with the school even when the student moves to another district.

This should be a brief summary and in such a form that it will be meaningful to Student Services and School Administrative personnel in the future. Schools and/or districts may wish to discuss this aspect of the meeting information and determine a common practice for the use of this notes section.

1.5 Audit Trail Tab

While this tab remains in view, it was created for another jurisdiction and has not been activated for use with the BC version of Student Services.

1.6 District Screening Team

The process for setting up and using this function is the same as above. However, you must decide whether to create a District Screening Team for your district model. The three most common models are:

- All decisions from referral to eligibility are made by the same team within the school – in this model you would have no need to set up a District Screening Team;
- A final determination of eligibility is made with the involvement of a district person either in concert with the School Based Team or subsequent to the School Based Team – in this model you would want to create a District Screening Team which may be a Team of one if a district individual makes the final determination, or may be a team which includes the district person. This allows the district person access to the students referred for final designation and enables a meeting to be created to capture the notes related to that determination;
- The School Based Team does a Review and determines whether the student would be eligible for designation, then refers the student to a District Screening Committee separate from the School Based Team. In this model you would want to create a District Screening Team and populate it with any persons that would act as regular members of the team.