

What is the Annual Date Review for Triennial Evaluations?

Per state and federal statutes, as well as the assurances made by the Agency of Education on the annual IDEA Grant Application to OSEP, the AOE monitors LEAs to ensure that evaluation planning teams are meeting and reviewing a student’s eligibility determination at least every three years (1095 days) and all re-evaluations are completed before their triennial due date. Federal regulations require that

Children with disabilities are evaluated in accordance with §§300.300(b)(3) through 300.311. (20 U.S.C. 1412(a)(7); 34 CFR sec.300.112) – also State Board Rule 2362.21.-2363.2.5. This data is monitored by the AOE through a desk audit based on information collected from the LEA’s child count submission.

What Data Needs to Be Collected?

These data are monitored by the AOE through cyclic monitoring based on information collected from the LEA’s previous and current Child Count submissions. The AOE compares the date between re-evaluations to ensure that the date reported in the most recent Child Count does not exceed three years (1095 days) from the previously reported date. If a student’s most recent evaluation is greater than 1095 days from the previous evaluation date, the AOE requires that the LEA verify accuracy through an examination of the student’s special education paper file.

Why Is the Triennial Date Review important?

Compliance monitoring is federally mandated for states and local school districts to receive federal special education (IDEA) grant funding.

General Instructions for Completing the Triennial Date Review Worksheet

The LEA is asked to verify and correct triennial evaluation date information that has been identified by the AOE as potentially non-compliant. When dates need revision, the LEA is also required to provide a rationale or clarification for correcting any date previously reported to the AOE. The AOE examines the revisions and clarifications before making a final determination regarding compliance for this monitoring activity.

Description of Data in Each Column

- Col A.** lists a unique student reference numbers (Perm Numbers) associated with a suspected non-compliant triennial evaluation. No data entry by the LEA is required. The column is password protected.
- Col B.** lists the Dates of Birth for students in Col A. No data entry by the LEA is required. The column is password protected.

- Col C.** lists the date of the suspected non-compliant triennial evaluations from the previous Child Count submission. If the date listed is incorrect, please delete the incorrect date and replace it with the correct one from the student’s special education paper file.
- Col D.** lists the date of the suspected non-compliant triennial evaluations from the current Child Count submission. If the date listed is incorrect, please delete the incorrect date and replace it with the correct one from the student’s special education paper file.
- Col E.** lists the days between the previous and current triennial evaluations. No data entry by the LEA is required. Each cell automatically populates, based on the dates in C and D.
- Col F.** requires the LEA to provide a rationale or clarification for any revisions made.
- Col G.** Form 8 is a written agreement between the parent and the LEA not to conduct a re-evaluation within 1095 days. The LEA is required to note the use of Form 8 as appropriate. Please choose from a dropdown menu the appropriate Yes/No response.
- Col H.** This column calculates a new potential compliance status based on revisions provided by the LEA. No data entry by the LEA is required. The column is password protected.

Please note: The AOE examines the revisions and clarifications before making a final determination regarding compliance for this monitoring activity.

Cell H1 Calculates the original suspected non-compliant triennial evaluations. No data entry is required.

Cell H2 Calculates the number of suspected triennial evaluations revised by the LEA. No data entry is required.

General Instructions for Submitting the Annual Date Review – Triennial Evaluation Worksheet

All cyclic monitoring submissions and reviews are conducted through IDEA Consolidated Monitoring section of the AOE’s Grants Management System.

For questions, please contact:

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