

Definitions for Individual Needs Assessment and Individual Learning Plan Types and Recommended Workflows

There are two Individual Needs Assessment (INA) and Individual Learning Plan (ILP) types: 30-day/Initial and Annual. The following definitions and recommendations will help you determine which type to use in different scenarios. The four scenarios listed below include three categories: 1) returning students who need the Annual INA/ILP, 2) new students who require the 30-day Initial INA/ILP, and 3) students who only require an update to the ILP and the Annual Parent Notification. **Due to the importance of Identification & Recruitment (I&R), the CDE encourages Recruiters to spend a majority of their time recruiting families and youths. Consider assigning INA/ILP tasks to other local staff.**

Returning Students – Annual INA/ILP

Scenario 1: Returning with no gap in enrollment

A child has been re-enrolled at the beginning of the school year, in August or September. They were also enrolled in the Migrant Education Program (MEP) in the prior year.

This student is “returning with no gap in enrollment,” meaning that they had enrollment history in your region last year and they have been re-enrolled this year. **Use the “Annual” INA/ILP type.**

Example: Returning with no gap in enrollment

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Demographic Contact Info **Enrollment Info** Eligibility Status Move History Service Participation Communication Events Course History INA/ILP

Enrollments

Child recently re-enrolled and was enrolled in the prior school year.

Region 09 - San Diego County Office of Education

School Year	Type	Grade	Track	County	District	School	Enroll Date	Withdrawal Date	Departure Date	PFS	Source
2020-21	R	06		37	Bonsall Unified	Norman L. Sullivan Middle	08/24/2020			<input type="checkbox"/>	System / Sandi Garth
2019-20	R	05		37	Bonsall Unified	Vivian Banks Charter	08/21/2019	06/10/2020		<input type="checkbox"/>	COE / D917989
2018-19	R	04		37	Bonsall Unified	Vivian Banks Charter	08/15/2018	06/05/2019		<input type="checkbox"/>	System / jayalvarez
2017-18	R	03		37	Bonsall Unified	Vivian Banks Charter	08/16/2017	06/07/2018		<input type="checkbox"/>	System / armartinez
2016-17	R	02		37	Bonsall Unified	Vivian Banks Charter	08/15/2016	06/02/2017		<input type="checkbox"/>	COE / C908658

Workflow recommendation: Assign staff to complete INA/ILPs for particular schools and/or grade ranges. Use the Active Student List to create a list of enrolled students that will serve as a worklist. Supervisors can monitor progress by using the Active

Student List to pull enrolled students and spot check to make sure they have complete INA/ILPs.

New Student – 30-day/Initial INA/ILP

Scenario 2: Returning but with a gap in enrollment

A child who was not present in your region or direct-funded district (DFD) last year has been re-enrolled this year at the beginning of the school year, in August or September.

This student is “returning but with a gap in enrollment,” meaning they have been enrolled in the region/DFD in prior years, but they were not enrolled last year. This year, they have returned to your region. This year’s enrollment line can be from a re-enrollment (based on an older Certificate of Eligibility (COE) with remaining eligibility) or a new COE. **Use the “30-day/Initial” INA/ILP type.**

Example: Returning but with a gap in enrollment

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Demographic Contact Info **Enrollment Info** Eligibility Status Move History Service Participation Communication Events Course History INA/ILP

Enrollments

Child recently re-enrolled but there is a gap (no line for 2019-20).

Region 09 - San Diego County Office of Education

School Year	Type	Grade	Track	County	District	School	Enroll Date	Withdrawal Date	Departure Date	PFS	Source
2020-21	R	08		37	Bonsall Unified	Norman L. Sullivan Middle	08/24/2020			<input type="checkbox"/>	System / Sandi Garth
2018-19	R	06		37	Bonsall Unified	Norman L. Sullivan Middle	08/15/2018	06/05/2019		<input type="checkbox"/>	COE / D916796

Workflow recommendation: For a child who was not in your region last year, different MEP staff can become aware of their return in different ways (e.g., Annual Verification calls, district referrals, etc.). These cases should be handed-off to a Data Specialist so they can re-enroll the child, then refer the case to a staff person who can complete the INA/ILP within 30 days of the child’s re-enrollment in the MEP. For a child who is returning after a gap in enrollment and who is getting a new COE, a State Educational Agency (SEA) Reviewer can refer the case (after verifying the COE) to the appropriate MEP staff who will complete the INA/ILP within 30 days of verifying the COE.

Scenario 3: New to your region/DFD

A child has recently been recruited who has never been enrolled in your region/DFD before.

This student is “new to your region/DFD,” meaning that they will not have any enrollment history in your region (except for the new enrollment line from the recently verified COE). **Use the “30-day/Initial” INA/ILP type.**

Example: New to your region/DFD

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INA/ILP

Enrollments

Child has only one enrollment line for your region from a recently verified COE.

Region 09 - San Diego County Office of Education

School Year	Type	Grade	Track	County	District	School	Enroll Date	Withdrawal Date	Departure Date	PFS	Source
2020-21	R	02		37	Encinitas Union Elementary	Paul Ecke-central Elementary	08/17/2020			<input type="checkbox"/>	COE / D918367

Workflow recommendation: For a child who is new to your region and is coming in based on a new COE, an SEA Reviewer can refer the case (after verifying the COE) to the appropriate MEP staff who will complete the INA/ILP within 30 days of verifying the COE.

No INA needed – Update the ILP and send the Annual Parent Notification

Scenario 4: Moved to a new district in your region

A child who already had an INA/ILP completed in the current school year has moved to a new district within the region. Do not create a new INA/ILP; instead, update the existing form's ILP portion to reflect the services that will be provided in the new district.

This student has “moved to a new district in your region,” meaning that they are now enrolled in a different district, compared to earlier in the same school year.

Example: Moved to a new district in your region

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Enrollments

Child has two enrollments in the same school year at different districts.

Region 09 - San Diego County Office of Education

School Year	Type	Grade	Track	County	District	School	Enroll Date	Withdrawal Date	Departure Date	PFS	Source
2020-21	R	06		37	Borrego Springs Unified	Borrego Springs Middle	09/28/2020			<input type="checkbox"/>	System / ramonsosa
2020-21	R	06		37	Bonsall Unified	Norman L. Sullivan Middle	08/17/2020	09/25/2020		<input type="checkbox"/>	System / jvalencia
2019-20	R	05		37	Bonsall Unified	Bonsall Elementary	08/21/2019	06/05/2020		<input checked="" type="checkbox"/>	System / armartinez
2018-19	R	04		37	Bonsall Unified	Bonsall Elementary	08/15/2018	06/05/2019		<input type="checkbox"/>	System / jayalvarez
2018-19	N	04		37	Bonsall Unified	Bonsall Elementary				<input type="checkbox"/>	COE / D917405

Workflow recommendation: The Data Specialist who adds the new enrollment line in the new district can refer the case to a MEP staff person who will update the ILP portion of the existing INA/ILP (assuming the child did receive an INA/ILP at the original district early in the Fall term).

These four scenarios will cover nearly every case in your region/DFD. If you encounter a situation that cannot fit any of these scenarios, please reach out to your local leadership team, who may then decide to contact the CDE and/or WestEd for additional support.

**When do I use an Initial or Annual INA/ILP?
A Cheat Sheet for MEP Staff**

Scenarios	Type of Student	What's Required?	Workflow Recommendation
Scenario 1: Returning with no gap in enrollment	Returning	<ul style="list-style-type: none"> • Annual INA/ILP • Annual Parent Notification 	Assign staff to complete INA/ILPs for particular schools and/or grade ranges. Use the Active Student List to create a list of enrolled students that will serve as a worklist. Supervisors can monitor progress by using the Active Student List to pull enrolled students and spot checking to make sure they have completed INA/ILPs.
Scenario 2: Returning but with a gap in enrollment	New	<ul style="list-style-type: none"> • Initial INA/ILP • Annual Parent Notification 	For a child who was not in your region last year, different MEP staff can become aware of their return in different ways (e.g., Annual Verification calls, district referrals, etc.). These cases should be handed-off to a Data Specialist so they can re-enroll the child, then refer the case to a staff person who can complete the INA/ILP within 30 days of the child's re-enrollment in the MEP. For a child who is returning after a gap in enrollment and they are getting a new COE, an SEA Reviewer can refer the case (after verifying the COE) to the appropriate MEP staff who will complete the INA/ILP within 30 days of verifying the COE.
Scenario 3: New to your region/DFD	New	<ul style="list-style-type: none"> • Initial INA/ILP • Annual Parent Notification 	For a child who is new to your region and is coming in based on a new COE, an SEA Reviewer can refer the case (after verifying the COE) to the appropriate MEP staff who will complete the INA/ILP within 30 days of verifying the COE.
Scenario 4: Moved to a new district in your region	Neither – this is a current student	<ul style="list-style-type: none"> • Update to current ILP only • Annual Parent Notification 	The Data Specialist who adds the new enrollment line in the new district can refer the case to a MEP staff person who will update the ILP portion of the existing INA/ILP (assuming the child did receive an INA/ILP at the original district early in the Fall term).