Targeted Monitoring – 2025 Monitoring Year
2025 CIM Cohort – Targeted Level 3

CIM Step 1–Gather and Inquire: Student Record Review and the incorporated Policies and Procedures Review (required)

Description

Self-Review Portion of the Student Record Review

The Student Record Review (SRR) is a required activity for all Targeted Level 3 LEAs developing CIM Plans in 2025. Each participating LEA will receive an email containing log-on information to a secure online SRR software/database portal (SRR portal).

Each LEA will commence the SRR as a self-review, responding to protocol items within the SRR portal that are specific to the LEA's monitoring identification. The LEA must *complete and submit* its self-review findings and supporting documentation in the SRR portal by **June 30, 2025**.

The LEA's self-review portion of the SRR is part of the CIM Step 1 process in which the LEA gathers and reviews data and other information to identify problem areas the LEA will later address in subsequent CIM Steps and activities. Accordingly, *in addition* to submitting its SRR self-review findings to the CDE through the SRR portal, each LEA must prepare and submit as part of CIM Step 1 a summary of its SRR self-review findings. Targeted Level 3 LEAs will enter and submit their summaries in Stepwell by **July 10, 2025**, for review by the CDE.

Corrective Actions and the Policies and Procedures Review

The CDE anticipates issuing final SRR findings in August of 2025. The CDE will also issue student-level and LEA-level corrective actions for each SRR with the final findings of noncompliance. The Policies and Procedures Review (PPR) is now incorporated into the LEA-level corrective actions arising from findings of noncompliance in the SRR. The PPR requires the LEA to document that it has a written, board-adopted policy covering each item for which the LEA had final findings of noncompliance in the SRR. Given that final SRR findings and corrective actions will not be issued until after the submission of Step 1 documentation, the LEA will not be submitting a SRR summary as part of the CIM Step 1–Gather & Inquire activity. However, the LEA may consider information learned from the SRR and PPR as the CIM process proceeds, including during CIM Step 4 as the LEA is monitoring progress and considering adjustments to its CIM Plan.

LEA Required Tasks for Completing the Self-Review Portion of the SRR

Targeted Level 3 LEAs

- Log into the SRR portal.

  Note: As of January 2025, the CDE is determining whether the Stepwell platform or the Special Education Compliance Monitoring System [SECMS] will serve as the SRR portal. This will affect the handling of student lists.

- Confirm the student list

  - **If Stepwell serves as the portal**, the student list will appear automatically within Stepwell. If any of the students on that list have exited, the LEA must immediately notify the Targeted Consultant and provide exit documentation. The CDE may add additional names to the student list, requiring enrollment status confirmation by the LEA.

  - **If SECMS serves as the portal**, the LEA will receive a student list from the CDE and follow instructions to confirm enrollment status and enter student names into SECMS. However, the Targeted Consultant has discretion to specify alternative methods to the LEA for finalizing student lists and entering the final list into SECMS.

- Review student records, applying the protocol found in the portal to the student record, focusing on the most recent Individualized Education Plan (IEP).

- Enter the findings into the portal.

- Enter instructions into the portal for CDE electronic access to all student records applicable to the review.

- Submit the findings and instructions entered into the portal by **June 30, 2025**.

  (Note that after entering findings and information into the portal, the LEA must advance the process by submitting the findings and information through the portal.)

- Receive notice of final findings and corrective actions from CDE, projected to be sent in August 2025.

- Use the portal to submit documentation of corrective actions and participate in follow-up (Prong II) reviews, if needed. (See caltan.info/monitoring for more information on corrective actions and Prong II reviews.)

LEA Required Tasks for Completing the Summarization Portion of the SRR

Targeted Level 3 LEAs

- Summarize the self-review portion of the SRR activity by entering the required information into Stepwell, as shown below. Submit to the CDE via Stepwell by **July 10, 2025**.

11) Student Record Review
[In this box, provide a summary of summary of relevant findings from the self-review portion of the SRR, noting any areas of concern suggested by those findings. Include, if presently known, a summary of any adjustments that may be necessary to the LEA's written policies and procedures   *If the LEA was identified for Restraint and Seclusion and/or California Alternate Assessment (CAA) items in the SRR, the above summarization must include specific references to those areas.]*

Note: Box *"12) Student Case Study"* in Stepwell does not apply to Targeted tier LEAs that are developing CIM Plans in 2025. To proceed in Stepwell, mark the box NA.