

# New Feature in ACHIEVE: My To-Do List

“My To-Do List” is designed to provide email and on-screen reminders for select tasks with upcoming deadlines. The first group of to-do list items to be released will focus on compliance-based and time-sensitive tasks for IFSP and IEP case owners, service providers and evaluation facilitators.

## Description

A new “My To-Do List” accordion will appear on **My Dashboard** upon login, providing easy access to both system-generated and user-created tasks. Users can filter and sort to-do list items for better organization. Weekly email notifications will notify users when task deadlines have passed or are approaching their due date. If there are no to-do tasks assigned to the user, the section will be hidden from the user’s dashboard.

Item	Learner	Days Left	Due Date	Actions
Schedule and Hold initial Individualized Education Program meeting		9	10/10/2025	<button>Resolve</button>
Halloween Party!!		29	10/31/2025	<button>Mark Complete</button>

## System-Generated To-Do Items

ACHIEVE will automatically generate the following tasks based upon the logic outlined below. Items will appear on **My Dashboard** for the assigned user for each task in a new “My To-Do List” section:

### For Early ACCESS:

- **Complete the first service delivery log (Compliance: SPP/APR Indicator C1)**
  - Purpose of To-Do List Task: The first Part C service delivery must occur within 30 days of the corresponding date of approved Consent for Early ACCESS Services.
  - Who Receives the Task: Assigned service providers will receive this task when newly assigned services are added to an IFSP with an associated Consent for Early ACCESS Services.
  - Task Will Automatically Be Resolved When: Service provider completes the first service delivery log for the newly added service or the learner’s case is exited from services.
- **Transition Planning required before third birthday (Compliance: SPP/APR Indicator C8)**
  - Purpose of To-Do List Task: Transition planning meeting should begin at least 90 days prior to a learner’s third birthday.
  - Who Receives the Task: The service coordinator will be assigned this task 135 days prior to the learner’s third birthday if an *Early ACCESS Transition Planning* meeting has not yet been scheduled.
  - Task Will Be Automatically Resolved When: Service coordinator schedules *Early ACCESS Transition Planning* meeting, learner reaches the age of 3 or the learner’s case is exited from services.

- **Incomplete IFSP (Time-Sensitive)**

- Purpose of To-Do List Task: IDEA requires timely and accurate documentation.
- Who Receives the Task: The service coordinator will be assigned this task 15 days after the first IFSP meeting was held as a reminder that the IFSP has not yet been finalized.
- Task Will Be Automatically Resolved When: Service coordinator finalizes the initial IFSP or the learner's case is ended/exited from services.

## For Special Education:

- **Child Find Evaluations (Compliance: SPP/APR Indicator B11)**

- Purpose of this To-Do List Task: IDEA requires that Part B eligibility determination be completed within 60 days of receiving consent for Full and Individual Initial Evaluation. If this timeline is not met, justification is required prior to finalizing evaluation.
- Who Receives the Task: The evaluation facilitator will be assigned this task if an *Eligibility for Special Education Services* meeting has not yet been scheduled and 44 days or more have passed since the approved *Consent for Full and Individual Initial Evaluation* was received.
- Task Will Be Automatically Resolved When: Evaluation facilitator schedules *Eligibility for Special Education Services* meeting or the learner's case is ended.

- **Early Childhood Transition (Compliance: SPP/APR Indicator B12)**

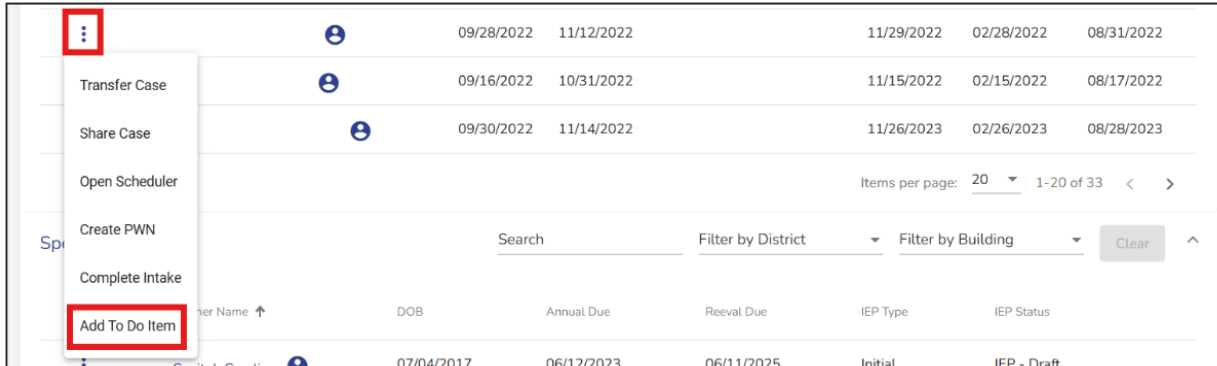
- Purpose of this To-Do List Task: IDEA requires that eligible learners transitioning from Part C to B have an IEP implemented by the learner's third birthday. If this timeline is not met, justification is required prior to finalizing the first IEP.
- Who Receives the Task: The IEP facilitator will be assigned this task for learners who had an active IFSP on the date the approved *Consent for Full and Individual Initial Evaluation* was received, have been determined eligible for special education services, and do not yet have an IEP meeting scheduled. Assignment will occur when either 45 days have passed since receipt of the approved consent or 15 days prior to the learner's third birthday, whichever occurs first.
- Task Will Automatically Be Resolved When: IEP facilitator schedules *Individualized Education Program (IEP)* meeting or the learner's case is ended.

- **Incomplete IEP (Time-Sensitive)**

- Purpose of this To-Do List Task: IDEA requires timely and accurate documentation.
- Who Receives the Task: The IEP facilitator will be assigned this task 15 days after the first IEP meeting was held as a reminder that the IEP has not yet been finalized.
- Task Will Automatically Be Resolved When: IEP facilitator finalizes the IEP or the learner's case is ended/exited from services.

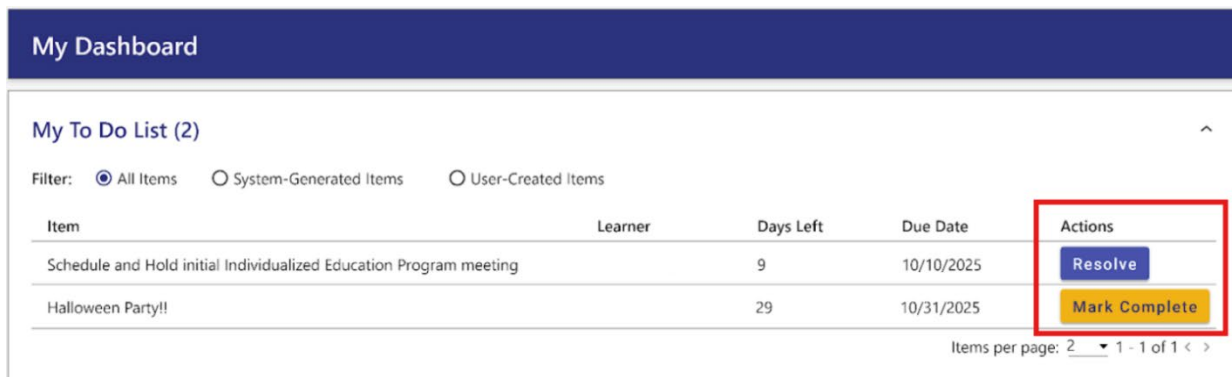
## User Created To-Do List Items

In addition to system-generated tasks, users can create custom to-do items for each learner on their case list. To add a custom task, select “Add To-Do Item” from the kebab option next to the learner’s name. On the pop-up modal, add the task description and due date and then click the *Add* button. The custom to-do task will appear on the “My To-Do List” for the user.



## Closing Tasks Once Completed

- System-generated tasks may be completed by selecting the *Resolve* button, which automatically directs users to the required task. If a learner exits services or a learner’s case is ended, the to-do task will be resolved.
- User-created tasks may be manually closed by selecting the *Mark Complete* button.



## Transferring Items

- **Case Owner Transfer:** If a learner’s case is transferred, existing to-do list items will transfer to the new case owner’s “My To-Do List” and will be removed from the previous owner’s “My To-Do List” section.
- **Evaluation Facilitator Transfer:** If a facilitator is reassigned for the evaluation, existing to-do list items will transfer to the new evaluation facilitator’s “My To-Do List” and be removed from the previous facilitator’s “My To-Do List” section.
- **Service Providers Transfer:** If service providers are modified, amended or edited on the IFSP/IEP, the appropriate items will be added to the new service provider’s “My To-Do List” and removed for providers no longer listed on the IFSP/IEP.

## Note for Family Portal Users

The “My To-Do List” feature will not be available to Family Portal users. Additionally, to-do list items created for ACHIEVE users will not be visible to families.