

**Department of Exceptional Student Education
Matrix of Services Funding Document**

Fast Fact # 20 (9-15)

<p>(What is the Matrix of Services funding document?)</p>	<p>The Matrix of Services is the document used to determine the cost factor for each student receiving exceptional student education services, based on the decisions made by the IEP Team. In 1997, the Florida Legislature began to finance ESE using a Matrix of Services based on the intensity of services provided to ESE students. In the Matrix, five domains are used to group the types of services and five levels are used to describe the nature and intensity of services within each domain. The most current revision to the Matrix of Services is effective July 1, 2015. <u>The Matrix of Services is an auditable document.</u></p>
<p>Why do we complete a Matrix of Services?</p>	<p>The intent of the Matrix is to base school district funding upon the services actually provided to the student throughout the school day and across all settings, as documented on the Matrix of Services form. The Legislature implemented the Matrix based on the assumption that students' needs are more clearly reflected by the actual types of services required than by the student's primary exceptionality. Districts use the Matrix of Services to classify students' services on a scale of <i>one to five</i>, with <i>one</i> representing the lowest service level and <i>five</i> the highest level. Costs increase with each succeeding higher level. Districts determine the Matrix level for students based on the services described in the Individual Educational Plans (IEP) and Department of Education guidelines as described in the Matrix of Services (2015) Handbook for completing the (2015) Matrix of Services document.</p>
<p>Who completes the Matrix of Services?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> <u>At least two ESE personnel must complete the Matrix form.</u> ESE personnel includes: ESE teachers, Staffing Specialists, Staffing Coordinators, ESE District personnel, ESE Specialists, Speech/Language Pathologists/Therapists, and/or other ESE therapists. <input type="checkbox"/> <u>At least one of the two</u> ESE personnel completing the Matrix must have completed the 3 hour Matrix of Services training and the Matrix of Services Update (2015).
<p>When do we complete a Matrix of Services?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> A Matrix must be completed <u>immediately after the student's initial eligibility staffing meeting</u> that determines the student's eligibility for exceptional student education services (<i>for all levels, 251-255</i>). <input type="checkbox"/> Students with a Matrix of Services level of 251 or 252 <u>never</u> need another Matrix completed unless services provided move them to a level 254 or 255. <input type="checkbox"/> If upon conclusion of an IEP meeting, (annual review, review/revision), the student's total rating score on the matrix is 17 (253) or 21 (254) the team should review services on the matrix. If services do not change the level of support 4 or 5 (253 to 254 or 254 to 255) no new matrix is required. If services do change the level of support a new matrix must be completed. <input type="checkbox"/> For all students with support levels 4 and 5 (254-255) a new matrix must be completed at initial placement and every 3 years. If services change as a result of an IEP meeting (annual/review/revision) a new matrix must be completed. If services do not change as a result of an IEP/Review/Revision meeting, and the matrix is less than 3 years old a new matrix does not have to be completed, however the Review of the matrix must be documented on the front page of the matrix. Please note you may not add additional review lines to the form. <input type="checkbox"/> ESE personnel should be prepared to complete a <u>new Matrix if additional services indicate a change from a level 251, 252 or 253 to a level 254 or 255 upon the conclusion of IEP meetings</u> which include: <ul style="list-style-type: none"> ▪ Reviews/revisions ▪ Re-evaluations ▪ Change of placement (COP) ▪ Change of services/eligibilities due to lack of progress <input type="checkbox"/> <u>All exiting Pre-K students</u> must have new <u>Matrix</u>. <input type="checkbox"/> DJJ and Charter Schools must complete a <u>new Matrix (for all levels, 251 –255)</u> for their students <u>at each annual IEP meeting.</u>
<p>Where do we complete a Matrix of Services?</p>	<p>If a Matrix of Services document must be completed, <u>it must be completed at the conclusion of the IEP meeting at the school site where the meeting is being held.</u> Parent participation in the completion of the Matrix is not appropriate. The Matrix of Services is a funding document.</p>
<p>How do we complete the Matrix of Services?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Use the most recent form 2015 provided by the Florida DOE. <input type="checkbox"/> Reference and use the Matrix of Services Handbook (2015 edition) when completing every Matrix. <input type="checkbox"/> Complete all documentation on the cover sheet. Make sure the date on the Matrix is the IEP date. <input type="checkbox"/> When marking eligibility, be sure to mark the current eligibility category(ies), not where the student is served. It may be necessary to consult the student's eligibility determination records to accurately record the areas of eligibility. <input type="checkbox"/> Place a "P" next to the primary disability category. This is defined as the exceptionality that most <u>affects the student's ability to learn</u> (Check the student's J-screen and/or MO-1). Place a check mark next to all other current areas of eligibility. (Refer to any and all Eligibility Summary Forms, MO-1's.) <input type="checkbox"/> Check all services that will be provided to the student in Domains A through E. <input type="checkbox"/> Below each service in the Matrix Handbook, there appears a list that includes two types of items (carets and check marks) <ul style="list-style-type: none"> ▪ Items marked with a ">" (a caret) are prerequisites for checking the service and when checked are required documentation for monitoring.

- If more than one item in the list is marked with a ">", all the items so marked in the list are required.
- The items preceded by check marks are examples of the service.
- ❑ The last level in which check marks appear determines the domain rating. Remember to check the services, not just the domain level.
- ❑ Each student should be scored in all five domains, regardless of that student's area(s) of eligibility. For domains in which the student does not have a need for special education and related services, the student should be scored at a level 1.
- ❑ Check all Special Considerations statements that apply. Add the points and write the total on the Special Considerations Rating line. If none apply, place a "0" on the line.
- ❑ Sum the five domain ratings and the Special Considerations rating and indicate the total on the lines provided. This results in a cost factor of level 251, 252, 253, 254, or 255.
- ❑ Use the Cost Factor Scale on the last page and note the cost factor that corresponds to the ratings total.
Both the total of the ratings and the cost factor should be recorded on the top of the first page of the Matrix.

Record Keeping Responsibilities

- ❑ **The Matrix of Services is an auditable document.**
- ❑ When a new Matrix is completed, it is **placed in the cumulative folder with copies of the IEP paperwork.** The IEP documents and the corresponding Matrix are filed in the cumulative folder, within the ESE Documents Folder.
- ❑ The ESE Case Manager is responsible for providing an updated J-screen to the Data Processor, which includes any new information pertaining to the student's Matrix of Services rating score.

Important Points to Remember When Completing the Matrix of Services Document

- ❑ The Matrix of Services Handbook (2015) should be used to complete any Matrix of Services form (2015).
- ❑ The Matrix should reflect the special services to be provided to the student **as documented on the IEP.**
- ❑ IEPs that do not accurately document all services provided to the individual student in all domain areas will lead to under-funding or loss of funding.
- ❑ The frequency and intensity of the service and the qualifications of personnel required to provide the service determine the level of service.
- ❑ Appropriate places for documentation of services include the present level of academic and functional performance, measurable annual goals, short-term objectives, and statements regarding accommodations, modifications, delivery models, related services and/or in the additional comments section of the IEP.
- ❑ **Districts will be monitored on the services checked on Matrix forms.** A check mark on the Matrix reflects the district's commitment to provide that service as described on the IEP. Schools will be asked to provide supportive evidence that services checked on the Matrix are being provided. **Documentation of evidence does not eliminate the need to document the services on the IEP.** Supportive evidence may include logs, student and staff schedules, lesson plans, instructional materials, behavior plans, case notes, interviews and other documentation.
- ❑ Each service provided to a student should be checked in only one domain. **Although some services may seem to apply to more than one domain, they should only be checked in the domain that is most applicable.**
- ❑ Special service needs should be considered in relation to a student's same age peers.
- ❑ The Matrix is a funding document and is intended to reflect **services provided by the school district.** When necessary, it is completed at the end of the IEP meeting. Parent participation is not appropriate.
- ❑ School personnel should frequently monitor the Matrix of Services rating which is currently documented on the J-screen and FTE screen for accuracy. Once a student is counted at a school for FTE, any documentation errors are the responsibility of that school.
- ❑ **Receiving schools must always review incoming students' auditable paperwork such as the IEP and the Matrix of Services for accuracy.**
 - Upon reviewing the paperwork, the receiving school may decide to review/revise the IEP.
 - Follow the procedures outlined in the "When Do We Complete a Matrix" section to see if a new Matrix is indicated.
 - If the student's IEP is appropriate, but the Matrix of Services does not document services indicated on the IEP, follow these procedures for students rated at level 254 and 254.
 - Complete a new Matrix of services form with the current date.
 - **Write: "Corrected Copy"** on that Matrix of Services form.
 - **Write: "See Corrected Copy"** on the original Matrix form.
 - Staple the corrected copy to the top of the original Matrix form.
 - File both copies in the cumulative folder with the appropriate IEP.
- ❑ The Matrix of Services document is filed in the ESE Documents Folder in the cumulative folder along with the IEP.
- ❑ The Matrix of Services is an auditable document. If there is an error or change to the Matrix, a new Matrix document must be created. (The use of white out, erasures and /or cross outs are **not allowable** and will result in the Matrix being declared invalid.)
- ❑ An updated J-screen must be reviewed by a site-based designee before submission to the data processor for updates.

J-screens must be updated in the system within a week of completion of the Matrix.