Intermediate School District (ISD) Monitoring for B-4, 9, and 10

Michigan Department of Education Office of Special Education
April 2026

ISD aggregated data (Member Districts' and ISD's data) triggers monitoring activities based on the approved business rules. The following protocol is for use with ISDs with Member Districts participating in an ISD-Led Desk Audit or ISD's participating in an OSE-Led Desk Audit.

1. Notify the ISD or Member Districts

The ISD and/or Member District is notified they have been selected for an ISD-Led or OSE-Led Desk Audit via a letter loaded in Catamaran in the major release prior to the activity when possible. If the ISD is conducting the ISD-Led Desk Audit, they will notify the Member Districts to arrange a date to conduct the desk audit. The Michigan Department of Education (MDE) Office of Special Education (OSE) Monitoring and Technical Assistance Team (MTAT) Coordinator will create the desk audit from the Monitoring tab in Catamaran.

2. Schedule a conference to conduct the desk audit

Following notification, the ISD or MTAT member assigned to complete the desk audit must schedule a mutually agreed upon time to complete the desk audit. Desk audits may be conducted by phone, virtually or in-person. Parties should set aside 30 minutes to complete this activity. Participants from the ISD or Member District may include, but are not limited to, the ISD monitor, the ISD special education director, Special Education Supervisor, TA providers or any relevant staff.

3. Conduct the desk audit

At the agreed upon time, conduct the desk audit.

A. Greet the participants and set the purpose.

B. Review the data that triggered the activity.
C. Ask the following questions:

These are starter questions and any answers given may prompt further questions.

1. Does the ISD/Member District have written policies or procedures related to (insert topic here)?
2. If yes, ask are those policies or procedures compliant with the IDEA and the MARSE?
3. Does the ISD or Member District employ the personnel responsible for implementing the policies or procedures?
4. How does the ISD or Member District ensure that the personnel are implementing policies in accordance with the IDEA or the MARSE?
5. Are there other factors which may be contributing to the data?

D. Conclude by restating the answers given and give the ISD or Member District the opportunity to clarify any responses.
E. Thank the ISD or Member District participants and provide information regarding the next steps of issuing a report in the next major Catamaran release.

4. Complete the written report

For the OSE-Led Desk Audit:

(The following will be completed by MDE OSE)

Complete the Desk Audit Summary page to include the following information:

A. Is a Student Level Correction (SLCA) Required? ***This question is for MDE OSE Only.***
   1. If yes, further actions will need to be taken to manually submit information in Catamaran per the SLCA requested.
B. Interview Summary
   1. Summarize the interview(s) with the District, including the participant's title and the number of participants interviewed.
   2. Indicate any strengths.

3. Indicate any areas of concern and/or opportunities for improvement.

Complete the Final Report Worksheet page to include the following information:

A. Enter the Review Date in the space provided
B. Next, complete Section 2: Selection Criteria in the space provided
C. Complete the Results of Desk Audit section including:
    a. The number of interviews with staff members
    b. The number of student records reviewed.
    c. Complete the findings table if findings will be issued. If not, then leave the table blank.
    d. Finally, select either "If findings" or "If no findings" at the bottom of the page.

For the ISD-Led Desk Audit:

(The following will be completed by the ISD)

Complete the ISD-Led Desk Audit Interview Summary to include the following information:

A. The number of staff interviews conducted
B. Provide an overview of the interview(s) with the district that indicates patterns and/or overarching themes.
C. Indicate any strengths.
D. Indicate any areas of concern and/or opportunities for improvement.

Complete the ISD-Led Desk Audit Final Report Worksheet page to include the following information:

A. Enter the Review Date in the space provided
B. Next, complete Section 2: Selection Criteria in the space provided
C. Complete the findings table if findings will be issued. If not, then leave the table blank.
D. Finally, select either "If findings" or "If no findings" at the bottom of the page to provide the ISD's recommendation to MDE.

Note: If the ISD recommends issuing findings, contact the ISD's MTAT contact for assistance.

E. Once the worksheet is complete, Submit to MDE.

MDE will review the ISD's recommendations to determine if findings will be issued. If there are findings, they will be issued in the next Catamaran release. For additional information, see the ISD-Led Monitoring Resources on the ISD Monitoring Resources page of the Catamaran Technical Assistance Website.