



# Desk Audit Instructions

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

**Michigan Department of Education Office of Special Education  
July 2024**

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 a desk audit.

### 1. Notify the ISD or Member Districts

The ISD or Member District is notified they have been selected for a 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

**Complete the desk audit summary to include the following information:**

1. Desk Audit Summary- Is an SLCAP Required? ***This question is for MDE OSE Only.***
  - a. If yes, further actions will need to be taken to manually submit information in Catamaran per the SLCAP requested.
2. Interview Summary
  - a. Include the participant's title and number of participants interviewed.
  - b. Summarize the interview:
    - Indicate any strengths.
    - Indicate any areas of concern.
    - Opportunities for improvement.

An ISD representative will send an email with the completed written report to the assigned MTAT team member for review and submission in Catamaran. The final report will be entered in Catamaran by the MTAT member.