

# Experts Series: The IEP Process, Documentation, and Conflict Resolution



with Jen Wissinger, PT, DPT, Pam Stephenson, OTD, OTR/L, BCP, FAOTA,  
Carlo Vialu, PT, MBA, and Sue Cecere, PT, MHS

October 21, 2025, 8:30 am–3:30 pm ET

Online via Zoom + 60-day access to on-demand version

Full \$259 Early Bird \$229 Early Bird Group \$199

Early bird savings end October 3, 2025

*Elevate your therapy practice!*

Overwhelmed by the IEP process? Unsure how to clearly define your role in the school setting? Apply EBP's Experts Series is here to help. This four-part course offers practical, real-world guidance from 4 experts on the Individualized Education Program (IEP) process, documentation, and conflict resolution.

In Seminar 1, Jen starts the day by explaining the OT, PT, and SLP perspectives on the development of a student's IEP. You'll receive guidance



and examples on completing parts of the IEP document, such as the Present Level of Performance, Annual Goals, and Progress Reporting, via a case study of a student receiving OT, PT

and Speech services. Level up your collaboration skills in Seminar 2, where Pam will guide you through the 5 Steps of a Collaborative Goal Writing Process. You will get a list of guiding questions and tips for each step, as well as, best practices to ensure each team member can articulate their expertise and feels valued throughout the process. In Seminar 3, Carlo will empower and equip you with effective language and strategies clearly articulating your roles in school-based practice versus in a medical setting. You will receive valuable resources for crafting elevator speeches, developing newsletters for educators, creating parent introduction letters, delivering internal presentations during professional development days, enhancing your evaluation reports, and actively advocating for your role in the student's educational success during IEP meetings. In Seminar 4, Sue will provide you a positive view and approach to conflict as an opportunity to clarify diverse perspectives, and engage the team in productive problem-solving. You will learn a practical 5-Step Conflict Resolution. You will learn to frame decisions using IDEA, state practice acts, and your professional association's Code of Ethics.

Leave this course with evidence-informed tools and strategies to help you contribute to the IEP process and document with confidence!

**Audience:** OTs, OTAs, PTs, PTAs, SLPs & Educators

**Educational Level:** Intermediate

## Your Mentors:

**Jennifer Wissinger, PT, DPT** served early intervention and preschool children in Columbus, Ohio. She is a Board-Certified Clinical Specialist in Pediatric Physical Therapy with over 15 years of experience practicing in public school districts (preschool through high school), county board of developmental disability programs for adults, home health care, and early intervention.

**Pam Stephenson, OTD, OTR/L, BCP, FAOTA** has enjoyed working in various interprofessional teams across pediatric settings, including in schools and in early intervention. Pam teaches at Mary Baldwin University in Fishersville, VA, and is the past Chairperson of the AOTA's Children and Youth Special Interest Section (CYSIS).

**Carlo Vialu, PT, MBA** is the co-author and co-publisher of [www.SeekFreaks.com](http://www.SeekFreaks.com), an evidence-based online resource for pediatric PTs, OTs, and SLPs. He served as Director of PT for the NYC Department of Education for 9 years, where he oversaw a program with over 700 PTs.

**Sue Cecere, PT, MHS** is the owner of Sequoia School Based Therapy Solutions, LLC, a consulting company that supports districts, agencies and therapists in the practice of school-based therapy services. Her career spans 25 years as provider and administrator in school and early intervention settings.

Disclosures: Jen, Pam, Carlo, and Sue receive speaking fees from Apply EBP, LLC. They have no relevant nonfinancial relationships to disclose. Carlo is the co-owner of Apply EBP, LLC.

## Registration

For more info and registration

[Click here!](#)

Or contact Carlo at

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646-269-9039

## Agenda

The times below are in **Eastern Time** (Note that you may be in a different time zone. Contact Carlo at [carlo@applyebp.com](mailto:carlo@applyebp.com) if you have any questions or need assistance).

8:30:00 am – 10:00 am: Seminar 1: OT, PT, Speech and Other Related Services' Role in the IEP Process: The IEP and Me | Jen Wissinger, PT, DPT

This seminar is focused on the development of the Individualized Education Program (IEP) document, the IEP meeting process and the implementation of the IEP, and your contribution in each of these as a related service provider. Jen will provide guidance and examples on completing various parts of the IEP document, such as the Present Level of Performance, Annual Goals and Progress Reporting, via a case study of a student receiving OT, PT and Speech services. Jen will also discuss other aids and services that may be included in the IEP, such as assistive technology, accommodations and modifications. Finally, she will present on the implementation of the IEP by discussing the plan of care, supervising therapy assistants, workload versus caseload, scheduling considerations, direct interventions and services on behalf of the student.

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify two opportunities for collaboration in the IEP development process.
2. Identify examples of related service provider's contribution to two sections in the IEP to support the team and the education of a student with a disability in school.
3. Select two examples of how a related service provider can address participation through service delivery as part of a team in an educational setting.

10:00 am – 10:15 am: Break

10:15 am – 11:45 am: Seminar 2: 5 Steps of Collaborative Goal Writing: Strategies for Related Service Providers and Educators | Pam Stephenson, OTD, OTR/L, BCP, FAOTA

Have you heard about the best practice of developing student goals collaboratively, but you are uncertain about where to begin? This course was tailored just for you! Pam starts the seminar by highlighting the advantages of adopting a collaborative approach to goal writing for students, their families, to you as a related service provider, and the entire IEP team. She delves into how setting goals as a team can break down the barriers of working on skills in isolation and how it can enhance consistent implementation of practice and intervention strategies throughout the school day. You will gain insights into the crucial groundwork of preparing the team to work as one unit. Pam will then guide you through the 5 Steps of a Collaborative Goal Writing Process. You will get a list of guiding questions and/or tips for each step. She will provide the best practices to ensure each team member can articulate their expertise clearly and feels valued throughout the process. Numerous examples illustrating opportunities for collaborative goals within various school contexts will be shared. Finally, she will discuss navigating Medicaid concerns. Leave the course with practical ideas and actionable steps for your team to take immediately, so you can begin creating student-centered collaborative IEP goals.

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify 2 potential benefits of creating collaborative student goals in school-based practice
2. Apply 3 strategies to facilitate the collaborative development of student-centered goals in a given case study of a student with disabilities
3. Determine 2 opportunities for collaborative goals within various contexts of a student's school function and participation

11:45 am – 12:15 pm: Lunch (on your own)

12:15 pm – 1:45 pm: Seminar 3: Explaining Medical-based vs School-based Services under IDEA: Tips for Sharing Your Expertise in Documentations, Meetings, and PDs | Carlo Vialu, PT, MBA

This course aims to empower and equip OT, PT, and Speech practitioners with effective strategies and valuable resources for clearly articulating their roles in school-based practice. Guided by Carlo, participants will gain insights into the distinctions between medical-based services and school-based services as governed by the Individuals with Disabilities Education Act (IDEA). Carlo will underscore the unique role that school-based practitioners play, setting them apart from their counterparts in homes, clinics, or hospitals. You will explore key strategies for clarifying your role within the school context, including talking up school participation from day 1, describing the ultimate goal of your services, framing discussions in terms of “opportunities for practice” rather than simply the frequency of services, and validating and addressing the concerns of families and educators. Recognizing that change is a gradual process, Carlo will delve into various avenues to effectively communicating your role in school-based practice. This includes crafting elevator speeches, creating parent introduction letters at the beginning of the school year, developing newsletters for educators, delivering internal presentations during professional development days, enhancing your evaluation reports, and actively advocating for your role in the student’s educational success during IEP meetings. Leave this seminar with concrete strategies and tools, such as a slide deck presentation, school newsletters, and templates for evaluation and parent introduction letter that you can use throughout the school year!

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify 3 differences between school-based and medical-based OT, PT and Speech services
2. Apply 3 strategies for explaining the role of school-based OT, PT, and Speech services in promoting a student’s access and participation in their education in given case scenarios
3. Determine 3 opportunities for explaining the role of school-based OT, PT and Speech service providers to other IEP team members

1:45 pm – 2:00 pm: Break

2:00 pm – 3:30 pm: Seminar 4: The 5 Practical Steps to Conflict Resolution in IEP Team Decision-Making | Sue Cecere, PT, MHS

In this seminar, you will learn a positive view and approach to conflict as an opportunity to clarify various perspectives and engage the team in productive problem-solving. Sue will walk you through a practical 5-Step Conflict Resolution Model to help you prepare and resolve conflicts in your next IEP meeting. You will explore potential conflicts between IDEA and State Practice Acts. Sue will also discuss the national associations’ (AOTA, APTA and ASHA) Code of Ethics as additional guidance for dealing with conflicts. Multiple familiar case scenarios will be utilized to help you apply what you learned right away.

Learning Objectives: At the completion of this course, the learner will be able to

1. Identify 3 steps that can assist you in resolving conflicts during school team meetings
2. Determine 3 IDEA considerations that can impact a school-based therapist’s contribution to the IEP process.
3. Select 3 ethical principles which may impact a school-based therapist when making IEP service decisions.

## CEUs

6 hours of continuing education training are awarded to learners who complete this course

### For OTs and OTAs

- Apply EBP, LLC is an AOTA-approved provider of CEUs. You will receive 0.15 CEUs for each seminar in this workshop, for a total of 0.6 AOTA CEUs.

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OT, PT, SLP Role in the IEP Process	5 Steps of Collaborative Goals
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Explaining MB vs. SB Services	IEP Conflict Resolution

### For PTs and PTAs

- Apply EBP, LLC is an approved provider of CEUs for PTs and PTAs in IL, NY, OK and TX (APS #: 2403055TX)
- This course is approved in NJ (#2201-64 thru 1/31/26) and MD (#2022-78 thru 2/17/2026).
- The seminars included in this course are approved for PTs and PTAs in CA.
- These PT state boards accept approval by other states boards or state associations: AK, AZ, DC, DE, FL, HI, IN, KS, KY, MA, MI, MT, NC, ND, OR, PA, RI, SC, SD, TN, UT, VT, VA, WI and WY.
- These states do not require pre-approval of courses or have no CE requirements: AL, CO, CT, GA, IA, ID, ME, MO, NE, NH and WA.

If you would like to obtain CEUs for another state, please email [carlo@applyebp.com](mailto:carlo@applyebp.com).

### For ASHA CEUs

- 0.6 ASHA CEUs | Intermediate Level
- Partial ASHA CEUs are provided if not all 4 Seminars are completed. Each completed Seminar counts for 0.15 ASHA CEUs.
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Apply EBP, LLC  
Intermediate Level  
0.6 ASHA CEUs

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On-demand access: You will receive access instructions for the on-demand versions on the day of the course. These on-demand versions are pre-recorded to ensure superior quality for a smooth learning experience. Pre-recordings deliver clear content free from distractions or technical issues common in live sessions. Please note that as a result, the pre-recorded and live versions may differ slightly. *For those attending the live course, your privacy is a priority. Feel confident in participating, knowing that no recordings will be made.*

Accommodation: Contact [carlo@applyebp.com](mailto:carlo@applyebp.com) for any requests for accommodation.