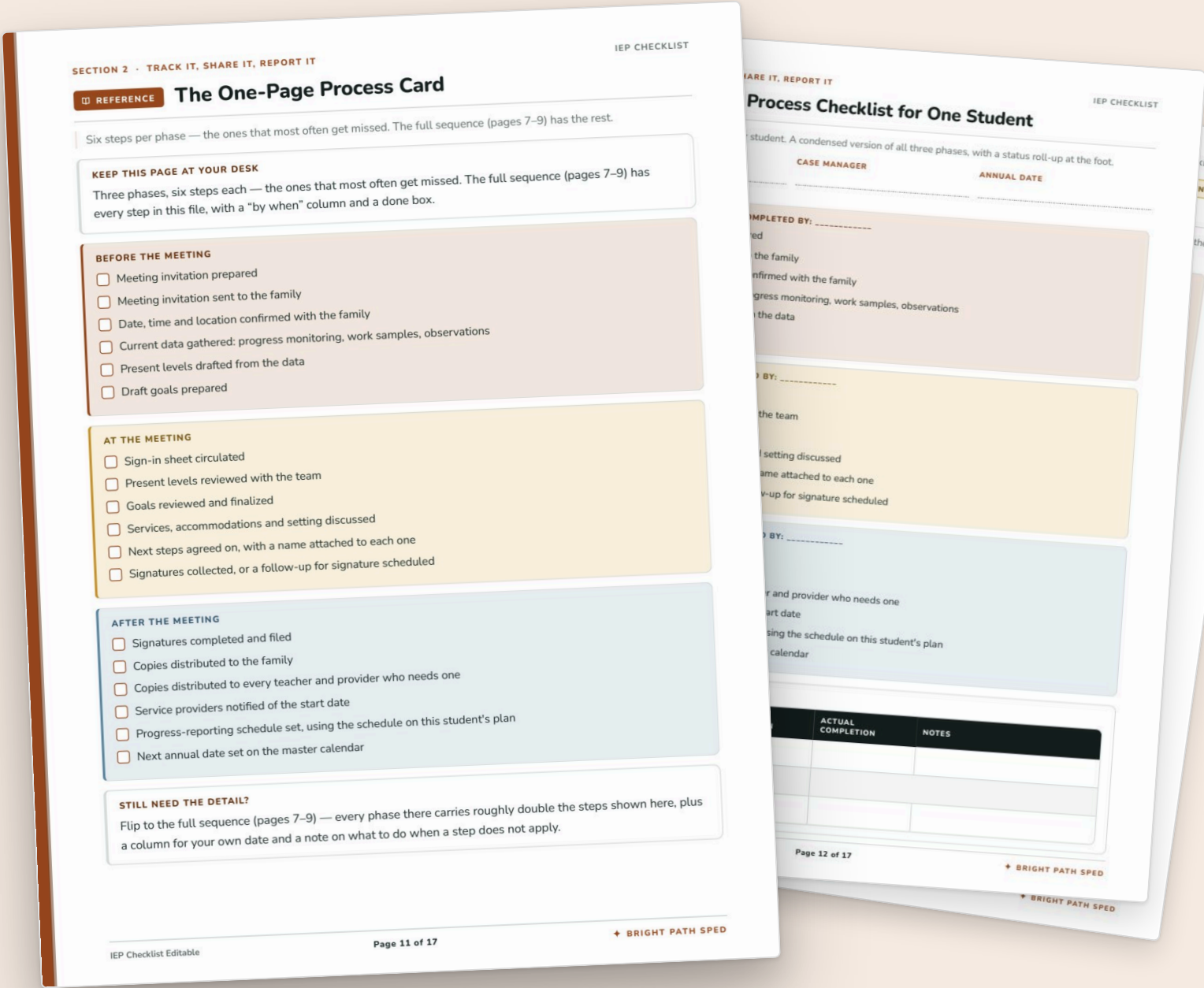


IEP Checklist



17 pages: a binder cover and tab index, the three-phase sequence in full, a condensed quick card, a master per-student checklist with a status roll-up, a short version for a related-service or general-education adult, a hand-off note, a phrase bank and a filled example. No caseload roster, no day-count.

About This File

PAGE 4



Start Here — Three Steps
START HERE

4

01 See the Full Sequence

PAGES 6–9



Binder Cover & Divider Tabs
SETUP

6



Before the Meeting — Preparation Steps
CHECKLIST

7



At the Meeting — Steps
CHECKLIST

8



After the Meeting — Steps
CHECKLIST

9

02 Track It, Share It, Report It

PAGES 11–16



The One-Page Process Card
REFERENCE

11



Master Process Checklist for One Student
STUDENT

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Quick Checklist for a Related Service Provider or General Education Teacher
CHECKLIST

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Team Hand-off and Status Update
NOTES

14



Turning a Step Into a Status Note
REFERENCE

15



Filled In, for One Invented Student
EXAMPLE

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READING THIS FILE'S TAGS

Setup — fill in once. **Checklist** — a step sequence to work through and tick off. **Reference** — read it, nothing to fill in. **Student** — one page, filled in once per student. **Notes** — a page meant to be sent, not filed. **Example** — a worked, invented student, so every other page has something real to compare against.

 CHECKLIST

Before the Meeting — Preparation Steps

The order shown is the common practice order many teams use, not a legal timeline. Write your own district's rule on the blank “by when” line.

BEFORE THE MEETING — GETS THE DATA, THE DRAFT, AND THE FAMILY'S VOICE IN PLACE BEFORE ANYONE SITS DOWN AT THE TABLE.

Work down the list; check the box when a step is done, and write your own district's date on the blank line next to it. This is a sequence to work, not a form someone grades.

#	STEP	BY WHEN (YOUR DISTRICT'S OWN RULE)	DONE
1	Annual date noted on the master calendar		
2	Meeting invitation prepared		
3	Meeting invitation sent to the family		
4	Date, time and location confirmed with the family		
5	Required team members identified and invited		
6	Interpreter or other accessibility need identified, if any		
7	Current data gathered: progress monitoring, work samples, observations		
8	Present levels drafted from the data		
9	Draft goals prepared		
10	Draft services and accommodations reviewed		
11	Related service provider input requested		
12	Parent/guardian input requested		
13	Draft shared with the family ahead of time, if that is this team's practice		

IF A STEP DOES NOT APPLY THIS YEAR

Mark it “n/a” on the Done line rather than leaving it blank, so a reviewer later knows it was considered and skipped on purpose, not forgotten.

WHAT THIS MIGHT LOOK LIKE, FOR ONE STEP

Present levels drafted	Three most recent progress-monitoring scores for reading fluency, plus a paragraph on math fact recall, written by the Thursday before the meeting.
Parent/guardian input requested	A one-page input form sent home, plus a phone call offered for any family who would rather talk it through.

 CHECKLIST

At the Meeting — Steps

The order shown is the common practice order many teams use, not a legal timeline. Write your own district's rule on the blank “by when” line.

AT THE MEETING — WHERE THE DRAFT BECOMES THE TEAM'S DECISION, OUT LOUD, WITH EVERYONE'S QUESTIONS ON THE RECORD.

Work down the list; check the box when a step is done, and write your own district's date on the blank line next to it. This is a sequence to work, not a form someone grades.

#	STEP	BY WHEN (YOUR DISTRICT'S OWN RULE)	DONE
1	Sign-in sheet circulated		
2	Roles introduced: who is there, and why		
3	Purpose of the meeting explained in plain language		
4	Present levels reviewed with the team		
5	Parent/guardian input discussed		
6	Goals reviewed and finalized		
7	Services, accommodations and setting discussed		
8	Family's questions and concerns recorded		
9	Next steps agreed on, with a name attached to each one		
10	Signatures collected, or a follow-up for signature scheduled		

IF A STEP DOES NOT APPLY THIS YEAR

Mark it “n/a” on the Done line rather than leaving it blank, so a reviewer later knows it was considered and skipped on purpose, not forgotten.

WHAT THIS MIGHT LOOK LIKE, FOR ONE STEP

Next steps agreed on	Ms. Alvarez sends the updated schedule to the general-education team; the case manager files the signed copy.
Family's questions and concerns recorded	Two questions about the new reading goal, written down word for word and answered before signatures.

STUDENT

Master Process Checklist for One Student

One page, filled in once per student. A condensed version of all three phases, with a status roll-up at the foot.

STUDENT

CASE MANAGER

ANNUAL DATE

BEFORE THE MEETING — COMPLETED BY: _____

☐ Meeting invitation prepared

☐ Meeting invitation sent to the family

☐ Date, time and location confirmed with the family

☐ Current data gathered: progress monitoring, work samples, observations

☐ Present levels drafted from the data

☐ Draft goals prepared

AT THE MEETING — COMPLETED BY: _____

☐ Sign-in sheet circulated

☐ Present levels reviewed with the team

☐ Goals reviewed and finalized

☐ Services, accommodations and setting discussed

☐ Next steps agreed on, with a name attached to each one

☐ Signatures collected, or a follow-up for signature scheduled

AFTER THE MEETING — COMPLETED BY: _____

☐ Signatures completed and filed

☐ Copies distributed to the family

☐ Copies distributed to every teacher and provider who needs one

☐ Service providers notified of the start date

☐ Progress-reporting schedule set, using the schedule on this student's plan

☐ Next annual date set on the master calendar

STATUS ROLL-UP FOR THIS STUDENT

PHASE	TARGET COMPLETION	ACTUAL COMPLETION	NOTES
Before the Meeting			
At the Meeting			
After the Meeting			



Quick Checklist for a Related Service Provider or General Education Teacher

Deliberately short. For the one adult outside the case manager's seat who needs to know their own part in the sequence, not the whole file.

STUDENT	YOUR ROLE / NAME	DATE

THIS PAGE IS DELIBERATELY SHORT

Your part of a longer sequence the case manager is tracking in full. No eligibility category, no goals, no health history — only the steps that involve you.

YOUR PART OF THE SEQUENCE

#	STEP	DONE	NOTES
1	Input requested before the meeting; provided by: _____		
2	Invited to attend, or asked to send written input		
3	Draft goals or services in your area reviewed		
4	Attended the meeting, or sent a representative		
5	Received a copy of the final document		
6	Started any new accommodation or service by: _____ (date)		
7	Signed, if a signature is required in your role		

WHO MIGHT HAND YOU THIS PAGE

A related service provider (speech, OT, PT, counseling), a general education teacher, or any other adult outside the case manager's own seat who has a small, specific part in a student's IEP year. You are not expected to track the whole sequence — only the rows above.

QUESTIONS OR SOMETHING THAT CHANGED

.....

.....

.....

BEST WAY TO REACH ME	SEND MY COPY BACK TO

EXAMPLE

Filled In, for One Invented Student

SAMPLE • INVENTED STUDENT

Dani R. is invented, and so is every number below. Every step in the status roll-up is the same six-item list used on the master checklist (page 12).

MASTER CHECKLIST (PAGE 12), DANI R. (INVENTED)

STUDENT

Dani R.

CASE MANAGER

T. Nguyen

ANNUAL DATE

Sept 15

PHASE	CONDENSED STEP	STATUS
Before the Meeting	Meeting invitation prepared	Done
Before the Meeting	Meeting invitation sent to the family	Done
Before the Meeting	Date, time and location confirmed with the family	Done
Before the Meeting	Current data gathered: progress monitoring, work samples, observations	Done
Before the Meeting	Present levels drafted from the data	Done
Before the Meeting	Draft goals prepared	In progress
At the Meeting	Sign-in sheet circulated	Done
At the Meeting	Present levels reviewed with the team	Done
At the Meeting	Goals reviewed and finalized	Done
At the Meeting	Services, accommodations and setting discussed	Done
At the Meeting	Next steps agreed on, with a name attached to each one	Done
At the Meeting	Signatures collected, or a follow-up for signature scheduled	Not yet
After the Meeting	Signatures completed and filed	Not yet
After the Meeting	Copies distributed to the family	Not yet
After the Meeting	Copies distributed to every teacher and provider who needs one	Not yet
After the Meeting	Service providers notified of the start date	Not yet
After the Meeting	Progress-reporting schedule set, using the schedule on this student's plan	Not yet
After the Meeting	Next annual date set on the master calendar	Not yet

STATUS ROLL-UP (PAGE 12), SAME THREE PHASES

PHASE	TARGET COMPLETION	ACTUAL COMPLETION	NOTES
Before the Meeting	Sept 10	–	Five of six done; draft goals still in progress, due Sept 10.
At the Meeting	Sept 15	–	Five of six done; one parent's signature still outstanding, follow-up scheduled Sept 18.
After the Meeting	Sept 22	–	Not yet due; copies go out this week.

FIVE OF SIX DONE IN TWO PHASES, NONE YET IN THE THIRD

Before/at-meeting each show five of six Done; the sixth item in each ("In progress"/"Not yet") is the one named in the roll-up's Notes column, and it is why the roll-up's Actual Completion cell for that phase is still "–" rather than a date. After-meeting shows zero of six Done, matching its own "–" cell.