

Keep a multi-provider team aligned on IEP goals and in touch across speech, occupational, physical therapy, counseling and other services. A provider contact sheet, an aligned-goals matrix, a weekly communication log, a resource-sharing log, team meeting notes, a quarterly summary, and a filled example for five providers and four students. Fillable PDF.

EXAMPLE

Example: Provider Contact Sheet Filled In

Five invented providers, four invented students with IEP goals. The matrix on the next page shows how goals are split across this team.

**Five invented providers for four invented students**

M.K. is an SLP seeing two students for speech goals. ID is an OT working on fine motor and self-care. T.L. is a PT on gross motor and mobility. S.A. is a counselor on social and emotional goals. R.C. is a reading specialist with two students. All meet weekly with the case manager.

| PROVIDER ROLE      | INITIALS | IEP GOALS THIS PROVIDER ADDRESSES                                  | FREQUENCY | CONTACT                      |
|--------------------|----------|--------------------------------------------------------------------|-----------|------------------------------|
| SLP                | M.K.     | Articulation, oral motor, phonological awareness for A.R. and C.P. | Weekly    | Room 12, ext. 412 (or email) |
| OT                 | J.D.     | Fine motor, self-care, handwriting for B.S. and C.P.               | Weekly    | Room 12, ext. 412 (or email) |
| PT                 | T.L.     | Gross motor, mobility, stairs and recess for B.S. and D.N.         | Weekly    | Room 12, ext. 412 (or email) |
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| Reading specialist | R.C.     | Decoding and fluency for A.R. and B.S.                             | Weekly    | Room 12, ext. 412 (or email) |

**Example: three entries from this team's communication log (page 7)**

The same format as page 7, filled in for this invented team: a goal reaching connection, a new student joining a provider's caseload, and the matrix update that followed it the same week.

| DATE | SHARED BY | TOPIC                         | TOLD       | ACTION ITEMS                      | INITIALS |
|------|-----------|-------------------------------|------------|-----------------------------------|----------|
|      |           | C.P.'s phrase-length goal met | S.A., case | CM schedules a 10-min add-on talk |          |

# How This Plan Works

A one-page-per-task approach, filled in before the IEP year starts and updated when goals or providers change. The communication log and check-in are ongoing; the matrix is revisited if goals change.

| PAGE | SHEET                          | WHAT IT IS FOR                                                                   | WHEN TO FILL IT IN                                                   |
|------|--------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------|
| 5    | Provider Contact Sheet         | Who provides services: roles, goals, how often you meet, contact info            | Before the IEP year begins; update if a provider changes             |
| 6    | Aligned-Goals Matrix           | Which provider works on which goal: one goal per row, one provider per column    | After the sheet, during the planning meeting; update if goals change |
| 7    | Weekly Communication Log       | Shared information, decisions, or changes: dated, initialed by both              | Ongoing; any change that affects more than one provider              |
| 8    | Resource-Sharing Log           | An article, strategy, or idea shared by a provider: what it is, who shared, when | Ongoing; whenever one provider passes something to the team          |
| 9    | Weekly Provider Check-In       | Meeting notes: which goals, which providers, what is next, follow-up due dates   | Every week or every other week, 15 minutes, in person or by video    |
| 10   | Quarterly Coordination Summary | Review of goals, alignment, communication, barriers, and plan for next quarter   | Four times a year, at or near report-card time                       |
| 11   | Provider Role Expectations     | What each role does on this team and what team communication looks like          | Beginning of year and whenever a new provider joins                  |
| 12   | Onboarding Checklist           | What every new or reassigned provider sees in the first week                     | Within the first week of the provider joining the team               |

## Before the IEP year begins

- 1 Contact sheet (page 5): who is on the team, their role, which goals they carry.
- 2 Aligned-goals matrix (page 6): every goal, every provider, who works on what.
- 3 Role expectations (page 11) and onboarding checklist (page 12): so every provider knows the plan.
- 4 Communication log (page 7) and resource log (page 8) started: the first entry is blank lines ready.

## When it changes mid-year

A new goal, a new provider, a provider who leaves: redo the matrix and the contact sheet the same day, date the new version, and keep the old behind it. The next communication log entry is where you note the change, what each provider needs to know, and who will tell them. A new provider sees the onboarding checklist within the first week.

## What this file is not

Not a provider credential record, a supervision log, or a legal statement of what each provider may be asked to do; that is your district's rule, and page 11 has room to write it in your own words. Not a substitute for each provider's own case notes, progress data, or session log. Not a health record: no clinical findings or medication here, only goals and what the team is working on together.

**This team's working definitions (write them here once, so page 5's "frequency" column means the same thing to everyone)**

WHAT "WEEKLY" MEANS FOR THIS TEAM

WHO CALLS A SPECIAL CHECK-IN IF A GOAL STALLS

WHERE THIS PLAN LIVES, AND WHO HAS ACCESS

WHO UPDATES THE MATRIX WHEN A GOAL CHANGES

# Aligned-Goals Matrix: Goals and Providers

Every IEP goal down the rows, each provider across the columns. A checkmark or initials in each cell shows which provider is working on which goal. This is the page that keeps everyone on the same page.

CASE MANAGER

IEP YEAR

EFFECTIVE DATE

NUMBER OF GOALS

| IEP GOAL (STUDENT INITIALS, DOMAIN) | PROVIDER 1 | PROVIDER 2 | PROVIDER 3 | PROVIDER 4 | PROVIDER 5 | PROVIDER 6 | PROVIDERS ON THIS GOAL |
|-------------------------------------|------------|------------|------------|------------|------------|------------|------------------------|
| Write it from the IEP               |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
|                                     |            |            |            |            |            |            |                        |
| Providers per goal (count)          |            |            |            |            |            |            |                        |

## One mark per cell: a checkmark, the provider's initials, or a brief code

Read down a column: all of one provider's goals.  
 Read across a row: all the providers on one goal.  
 Every goal has at least one provider. If a goal has no provider checked, stop and ask why before you leave this page.

## When a goal changes or a provider is added

Redo this matrix on the same date as the IEP change. Date the new version at the top and keep the old behind it. The next communication log entry (page 7) is where you name the change, what each affected provider needs to know, and who will tell them.

A shared decision or update, who it came from, who you told, next steps. Dated and initialed. The one-line record that ends “nobody told me.”

FIRST ENTRY DATE

[illegible]

## What goes here

A new goal, a provider change, or something one provider found the team needs. This page is the record of what changed and who knows about it.

## Open items

COORDINATION

Weekly Provider Check-In

Fifteen minutes, every week or every other week, with the team (by video or in one room). What is working, what needs to change, which student needs what next.

WEEK OF

FACILITATOR

PROVIDERS PRESENT (INITIALS)

Goals we are working on (list any new goals, any removed)

What is working well

What needs to change (barriers, misalignment, gaps)

Student updates or concerns (raised by provider)

| STUDENT | PROVIDER | ACTION ITEM OR FOLLOW-UP | DUE BY (DATE) | ASSIGNED TO |
|---------|----------|--------------------------|---------------|-------------|
|         |          |                          |               |             |
|         |          |                          |               |             |
|         |          |                          |               |             |
|         |          |                          |               |             |
|         |          |                          |               |             |

Next check-in date and who will send the reminder

Facilitator notes

## Confidentiality and Professional Boundaries

A short agreement in plain words: what stays in a student's file, what gets shared with the team, and what is reported, as your district's policy says.

### Our agreement, in plain words

Everything we see and hear about a student while we work together belongs to that student and their family, not to us. This page says what stays in the student's file, what is shared with the team, and what has to be reported and to whom, the way your district's policy says. It is not a legal document; it is the team agreeing on how we will behave.

### What stays in a student's file (write it)

.....

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### What is shared with the team, and how (the log on page 7, the check-in on page 9)

.....

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### What is reported, and to whom, as your district's policy says (write the policy's name and where it lives)

.....

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.....

.....

### Professional boundaries we keep

- ☐ We talk about a student only with the people on that student's team, and only where nobody else can hear.
- ☐ Initials on anything that leaves the room; nothing photographed; nothing in a group text.
- ☐ A question from a family goes to the case manager the same day; no provider answers it alone.
- ☐ What another provider said or did about a student stays in this team too.
- ☐ If anyone is not sure whether something can be shared, we do not share it until we have asked.

PROVIDER (SIGNATURE, DATE)

CASE MANAGER (SIGNATURE, DATE)

REVIEWED AGAIN ON

.....

**EXAMPLE**

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| DATE | SHARED BY    | TOPIC                                                         | TOLD            | ACTION ITEMS                                                  | INITIALS |
|------|--------------|---------------------------------------------------------------|-----------------|---------------------------------------------------------------|----------|
| 9/15 | M.K. (SLP)   | C.P.'s phrase-length goal met criterion; ready for a new goal | S.A., case mgr. | CM schedules a 10-min add-goal talk before the next IEP check | MK / CM  |
| 9/18 | Case manager | New student D.N. added to PT, starting 9/22                   | T.L.            | T.L. reviews D.N.'s goals, adds a matrix row by 9/22          | CM / TL  |
| 9/22 | T.L. (PT)    | D.N.'s gross-motor goal added: running and balance            | CM, S.A.        | S.A. adds it to the next weekly check-in agenda               | TL / CM  |

### Example: one entry from this team's resource-sharing log (page 8)

An article R.C. found for A.R.'s reading goal, dated and noted so the team knows what was tried and by whom.

| DATE SHARED | SHARED BY | RESOURCE                                              | RELEVANT TO   | NOTES                                                                                  | RECEIVED BY |
|-------------|-----------|-------------------------------------------------------|---------------|----------------------------------------------------------------------------------------|-------------|
| 9/20        | R.C.      | Article: syllable-segmentation games for CVC decoding | A.R., reading | Shared in the team folder; M.K. tried the first game during A.R.'s next speech session | MK          |