



Documentation

Collect • Organize • Tell the Story

Document Collection Checklist

This checklist will help you identify documents that may be useful when preparing for an IEP meeting, reviewing your child's educational program, or working with an advocate or attorney.

Not every document will apply to every student.

This checklist is organized into four categories:

1. Documents the school has provided over the years
2. Documents available in your child's educational record
3. Documents you have obtained or created and shared with the school
4. Draft documents you may want to request before a meeting



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Documents the School Has Given You

These are documents you may already have in emails, folders, binders, or saved electronically.

Start Here

If you only have time to collect four documents before your next meeting, begin with:

- ☐ Evaluation Reports
- ☐ IEPs
- ☐ Progress Reports
- ☐ Prior Written Notices

Evaluation & Eligibility

- ☐ Evaluation plans/Assessment Plans
- ☐ Consent to assess
- ☐ Prior Written Notices (PWNs)
- ☐ Evaluation Reports
- ☐ Eligibility Determination Paperwork
- ☐ Independent Education Evaluation (IEE)
Response Letters

Other School Correspondence

- ☐ Letters From The School
- ☐ Emails
- ☐ Meeting Summaries
- ☐ Discipline Notices
- ☐ Attendance Letters
- ☐ Section 504 Plans (if applicable)

IEP Documents

- ☐ Current IEPs
- ☐ Previous IEPs
- ☐ IEP Amendments/Addendums
- ☐ IEP Meeting Notices
- ☐ Excusal Forms
- ☐ Extended School Year (ESY)
Determinations
- ☐ Transition Plans
- ☐ Behavior Intervention Plans (BIPs)
- ☐ Safety Plans
- ☐ Transportation Plans

Progress

- ☐ IEP Progress Reports
- ☐ Report Cards
- ☐ State Assessment Reports
- ☐ District Assessment Reports



Documentation

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Documents Found in Your Child's Education Record

These documents (sometimes called the cumulative file or educational record) are often maintained by the school even if you have never received copies. Request your child's complete educational record if you don't already have them.

Student Records

- ☐ Enrollment Information
- ☐ Attendance Records
- ☐ Discipline Records
- ☐ Class Schedules
- ☐ Cumulative File

Evaluation Records

- ☐ Referral for Evaluation
- ☐ Parent Consent Forms
- ☐ All Psychoeducational Evaluations
- ☐ Speech-Language Evaluations
- ☐ Occupational Therapy Evaluations
- ☐ Functional Behavior Assessments (FBA)
- ☐ Assistive Technology Evaluations
- ☐ Health Assessments
- ☐ Vision/Hearing Assessments
- ☐ Transition Assessments
- ☐ All Reevaluation Reports

Educational Data

- ☐ Curriculum-Based Measurement (CBM)
- ☐ Reading Progress Monitoring
- ☐ Math Progress Monitoring
- ☐ Behavior Data
- ☐ Benchmark Assessments
- ☐ Classroom Assessment Data
- ☐ Progress Monitoring Data
- ☐ Teacher Observation Notes
- ☐ Work/Writing Samples

Communication

- ☐ Communication Logs
- ☐ Emails
- ☐ Parent Correspondence Kept in File
- ☐ Meeting Notes
- ☐ Internal Documentation Related to Decisions



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Related Services

- ☐ Speech Therapy Service Logs
- ☐ Occupational Therapy Documentation
- ☐ Physical Therapy Documentation
- ☐ Counseling Documentation
- ☐ School Psychologist Records
- ☐ Social Work Records
- ☐ Adapted PE Documentation
- ☐ Assistive Technology Documentation

Behavior

- ☐ Behavior Intervention Plans (BIPs)
- ☐ Functional Behavioral Assessments (FBA)
- ☐ ABC Data
- ☐ Behavior Logs
- ☐ Incident Reports
- ☐ Suspension Records
- ☐ Manifestation Determination Reviews
- ☐ Restraint/Seclusion Reports (if applicable)



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Documents You Have Obtained or Created

These documents often provide valuable information but may not always be included in the school's educational record.

Medical & Outside Evaluations

- ☐ Neuropsychological Evaluation
- ☐ Psychological Evaluation
- ☐ Developmental Pediatrician Reports
- ☐ Medical Records
- ☐ Physician Letters
- ☐ Psychiatrist Reports
- ☐ Neurologist Reports
- ☐ Therapy Reports
- ☐ Occupational Therapy Reports
- ☐ Speech-Language Reports
- ☐ Vision Reports
- ☐ Audiology Reports

Parent Information

- ☐ Parent Letters
- ☐ Parent Concerns
- ☐ Educational Timelines
- ☐ Home Observations
- ☐ Behavior Logs
- ☐ Reading Logs
- ☐ Homework Logs
- ☐ Samples of Work Completed at Home
- ☐ Photographs or Videos Shared w/ the Team

Outside Providers

- ☐ Tutoring Reports
- ☐ Private Therapy Summaries
- ☐ Independent Educational Recommendations
- ☐ Agency Reports
- ☐ Vocational Rehabilitation Documentation
- ☐ Early Intervention (IFSP) Records



Draft Documents You May Wish to Request Before an IEP Meeting

Many school districts prepare draft documents before meetings. Requesting them several days in advance gives you time to review them thoughtfully.

- ☐ Draft IEP
- ☐ Draft Present Levels (PLAAPF)
- ☐ Draft Annual Goals
- ☐ Draft Accommodations/Modifications
- ☐ Draft Service Recommendations
- ☐ Draft Transition Plan
- ☐ Draft Behavior Intervention Plan (BIP)
- ☐ Evaluation Reports Not Yet Provided
- ☐ Progress Data That Will Be Discussed
- ☐ Service Provider Reports
- ☐ Teacher Input Forms
- ☐ Updated Assessment Results
- ☐ Proposed Eligibility Documentation
- ☐ Meeting Agenda
- ☐ Documents That Will Be Presented During the Meeting



Advocate Tip

When requesting records, ask for your child's **complete educational record**, including the cumulative file, special education file, electronic records, evaluation reports, data, communications maintained as educational records, and all documents relied upon by the IEP team in making educational decisions.