

IEP Paperwork Checklist

A planning and documentation guide for educators and related-service providers

HOW TO USE THIS CHECKLIST

Use this framework to organize information before, during, and after an IEP meeting. Check the items that apply, add local requirements, and document questions for team discussion. No single checklist can replace federal, state, district, contract, or professional requirements.

Four-step workflow Keep the record connected to the team's decisions

1 Prepare Review the existing record and gather current information.	2 Connect Link present levels, needs, goals, services, and data.	3 Document Record the team's decisions and required service details.	4 Verify Check participation, accuracy, individualization, and local rules.
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Meeting information Complete before using the checklist

Student		Meeting date	
School / program		IEP type	
Case manager		Your role	

SCOPE NOTE This checklist focuses on the supplied core planning components. Additional requirements may apply, including transition planning, alternate-assessment documentation, procedural safeguards, prior written notice, and state-specific forms.

Before the IEP meeting

Gather current information without predetermining the team's decisions.

Preparation checklist Review the full educational picture

☐	Review the student's current IEP and existing goals.
☐	Review recent evaluations and relevant educational records.
☐	Gather current academic, functional, clinical, or treatment data.
☐	Review progress toward current annual goals.
☐	Gather information about the student's strengths.
☐	Obtain relevant input from teachers and service providers.
☐	Consider parent concerns and priorities.
☐	Identify significant changes in performance, needs, or circumstances.
☐	Review accommodations, modifications, supports, and services currently in place.
☐	Identify areas requiring team discussion rather than making predetermined decisions.

Evidence organizer Note what is ready and what is still needed

Progress data		Evaluation records	
Teacher/provider input		Parent concerns/priorities	

Questions for team discussion Do not resolve these outside the team process

Needs, changes, or decisions to discuss	
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TEAM DEVELOPMENT Preparation should support informed participation. Drafts and recommendations may help the team work efficiently, but the final IEP must accurately reflect the team's decisions.

Present levels

Describe current academic achievement and functional performance using current evidence and educational context.

Present-levels checklist Connect strengths, needs, data, and educational impact

☐	Describe current academic and functional performance.
☐	Include current baseline data and identify the data source.
☐	Explain how the student's disability affects involvement and progress in the general education curriculum or, for preschoolers, participation in appropriate activities.
☐	Identify strengths as well as needs.
☐	Connect areas of need to relevant evaluation and progress data.

Present-levels builder Write from current evidence

Student strengths	
Current academic and functional performance	
Baseline data and data source	
Educational impact statement	

FEDERAL REFERENCE - 34 C.F.R. 300.320(a)(1) The IEP must state the child's present levels of academic achievement and functional performance and describe how the disability affects curricular involvement and progress or preschool participation, as appropriate.

Annual goals

Use individualized, measurable goals that address identified educational needs.

Goal-quality checklist Check the connection to need and progress monitoring

☐	Make each annual goal measurable.
☐	Connect each goal to an identified educational need.
☐	Set a performance target tied to the student's baseline.
☐	Identify how progress will be measured.
☐	Document when periodic progress reports will be provided.
☐	Avoid goals copied solely because another student has a similar diagnosis.
☐	Review whether the goal addresses the identified educational need and supports progress.

Goal alignment Each element should answer the next

1	2	3	4	5
Present levels	Educational need	Annual goal	Services/supports	Progress data
What is happening now?	What change matters?	What will the student do?	What will enable progress?	How will change be measured?

Goal review Confirm measurability before finalizing

Identified educational need	
Observable behavior and conditions	
Performance target / criterion	
Progress measure and reporting schedule	

FEDERAL REFERENCE - 34 C.F.R. 300.320(a)(2)-(3) The IEP must include measurable annual academic and functional goals addressing disability-related educational needs, plus how progress will be measured and when periodic progress reports will be provided.

Services and supports

Document what will be provided and the details needed for implementation.

Services-and-supports checklist Review each applicable component

☐ Document special education and related services.	☐ Identify supplementary aids and services.
☐ Document relevant program modifications.	☐ Identify supports for school personnel when needed.
☐ Specify the projected start date.	☐ Specify the anticipated frequency, location, and duration.
☐ Review accommodations and assessment needs.	

Service details Record the team's decisions clearly

Service or support	Provider	Start date	Frequency	Location	Duration

Accommodations and assessment review Document individual need

Accommodations / modifications	
Assessment participation or accommodation needs	

FEDERAL REFERENCE - 34 C.F.R. 300.320(a)(4), (6), AND (7) The IEP addresses special education, related services, supplementary aids and services, program modifications, supports for school personnel, assessment accommodations, and the projected start date, frequency, location, and duration of services and modifications.

Before finalizing

Confirm participation, alignment, accuracy, and individualization.

Final review checklist Verify the record before it is completed

☐	Confirm that required IEP Team members participated.
☐	Confirm that parents were afforded the opportunity to participate.
☐	Review whether parent concerns were considered.
☐	Check alignment between present levels, needs, goals, services, and progress monitoring.
☐	Verify data and professional recommendations.
☐	Review AI-assisted or templated text for accuracy and individualization.
☐	Check applicable state and district requirements.
☐	Ensure the final IEP accurately reflects the team's decisions.

Participation record Follow local documentation requirements

Required members		Parent participation	
Related-service input		Student participation, if applicable	

Accuracy and individualization check Review every imported or generated statement

Text requiring correction or team confirmation	
Final decision or unresolved item	

PARTICIPATION REFERENCES - 34 C.F.R. 300.321 AND 300.322 IDEA identifies required IEP Team roles and requires the public agency to take steps to ensure that parents are present or afforded the opportunity to participate. Attendance exceptions and excusals have specific requirements.

Final alignment and completion

Use this page as the last paperwork review before submission or distribution.

Cross-component alignment Trace the same educational need through the IEP

1 Present levels What is happening now?	2 Educational need What change matters?	3 Annual goal What will the student do?	4 Services/supports What will enable progress?	5 Progress data How will change be measured?
☐	Present levels identify the current performance and educational impact.			
☐	Each annual goal addresses a documented educational need.			
☐	Services and supports are connected to access, participation, and goal progress.			
☐	Progress-monitoring methods match the behavior and criterion in each goal.			
☐	Accommodations and modifications are individualized and implementable.			
☐	The final document reflects the team's decisions without unresolved template language.			

Local and professional review Add requirements outside this federal framework

State / district checklist or form reviewed	
Role-specific documentation reviewed	
Outstanding questions / follow-up	

Federal reference points Official IDEA regulations

34 C.F.R. 300.320 - Required IEP content: sites.ed.gov/idea/regs/b/d/300.320

34 C.F.R. 300.321 - IEP Team: sites.ed.gov/idea/regs/b/d/300.321

34 C.F.R. 300.322 - Parent participation: sites.ed.gov/idea/regs/b/d/300.322

34 C.F.R. 300.324 - Development, review, and revision: sites.ed.gov/idea/regs/b/d/300.324

Prepared by		Date	
Final team review		Follow-up date	

PROFESSIONAL USE This educational organizer is not legal advice and is not an exhaustive compliance checklist. Follow current federal and state law, district procedures, collective-bargaining obligations, licensure standards, and discipline-specific requirements.