

Annual IEP Meeting Checklist

Updated 3-1-17

Student Name _____ Case Manager: _____

Date of Meeting _____

Before the Meeting

<u>Timeline</u>	<u>Date</u>	<u>Action</u>
5 weeks before end date of IEP	_____	Contact parent and obtain mutually agreeable date/time for 2 weeks later
5 weeks before end date of IEP	_____	Send out parent input and invite with parent & STUDENT listed on the invite
2 weeks before agreed meeting	_____	Enter the date/time into Director's google Calendar (this will serve as her invite)
1 week before agreed meeting	_____	Invite team members

if required team member not available send excusal form BEFORE meeting for permission

1 day before meeting _____ Contact parent and remind of meeting

If parent does not show for the meeting, you MUST make two more attempts ON DIFFERENT DATES before the meeting can be held (repeat steps 2, 3, 4)

1 week before agreed meeting	_____	Send peer IEP to be checklisted w/i 2 days
3 days before agreed meeting	_____	Make corrections to IEP
2 days before agreed meeting	_____	Send (email/mail) parents a draft IEP
Day of meeting	_____	Organize documents in order listed on back

During the Meeting

Beginning	Make Introductions (verify ALL required team members are present)
Beginning	Handout & explain "Whose Idea", scholarship programs and medicaid forms
During	Review key components of the IEP
During	Obtain signatures from all team members
During	Have parents sign section 14 for agreement
During	Make sure you have accurately checked the boxes at the bottom of section 14
During	Complete the PR-01

PR-01 Must be completed and given to parent BEFORE services begin, but NOT before the annual meeting

Fill in ALL boxes of the PR-01 with the information requested. Add relevant information from the meeting to the "Other Factors" section

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After the Meeting

<u>Timeline</u>	<u>Date</u>	<u>Action</u>
Immediately	_____	Make copies of IEP, PR-01 for parents
Immediately (no later than 1 week)	_____	Prepare & Deliver to: _____ Joni (original) _____ Accum. Folder (Secretary) _____ Case Manager Copy
Within 1 week	_____	Prepare & deliver IEP at a glance to team members
Within 24 hours	_____	Change schedule for change of placement (LRE)

When Submitting Original the following documents must be included in order listed below

- _____ Annual IEP Meeting Checklist
- _____ EMIS
- _____ IEP
- _____ PR01
- _____ Meeting Summary Form
- _____ Progress Reports
- _____ Progress Monitoring Data/Evidence
- _____ Transition Progress Data/Evidence
- _____ Parent Invite(s)
- _____ Copies of team member invites (email or PR02 General Invitation)
- _____ Documentation of attempts
- _____ Permission to conduct Transition Assessments and/or FBA (age 14 and above)
- _____ Scholarship/Medicaid Form
- _____ Case Manager Checklist
- _____ Accessibility Features Checklist

Case Manager Signature

Date

District Representative Signature

Date

Special Education Secretary

Date