

# IEP Checklist

Get ready early, actively  
participate and stay informed  
throughout the year!



## STEP 01

### Before The IEP Meeting:

**GET INVOLVED!** Developing an effective and appropriate Individualized Education Program or IEP for your child is essential to your child's success.

While IEPs typically cover a 12-month period, they help to create the foundation for your child's future. Think of the adult your child will become. When planning, think well beyond just one year. Get ready early, actively participate and stay connected throughout the year.

**REVIEW!** The Individuals with Disabilities Education Improvement Act (IDEA 2004) requires schools to give parents of students with disabilities adequate notice to participate in the IEP meeting. This notice is called Invitation to Meeting/Notice. The WI Department of Public Instruction considers reasonable notice to be 7-10 calendar days. The notice must be given to you in writing and in your native language.


**Carefully review the invitation/notice and consider the following:**

- ☐ Is the purpose of the meeting clearly stated?
- ☐ Was my child invited to the meeting? Is my child 14? Is my child 18?  
(Please note: This will be addressed further in the Transition Section)
- ☐ Who is attending? What are their roles in the meeting?
- ☐ Are there any team member excusal requests attached to invitation?
- ☐ Is the Date/Time/Location convenient for your schedule?



**STAY  
CONNECTED**

**RESPOND!** Read, respond, and return the Invitation to Meeting/ Prior Notice as soon as possible and keep a copy for your records. Include in writing any of the following that apply:

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- ☐ Suggestions for alternative meeting dates or times, if necessary
  - ☐ A request to participate by conference call or other way if you are unable to participate in person
  - ☐ A list of whom you are inviting, if anyone • consider inviting a friend, relative, outside professional or note taker, or anyone who has specific knowledge and/or expertise about your child
  - ☐ A list of concerns or issues that you wish to discuss: this is your agenda
  - ☐ A request for a copy of any proposed IEP draft, well in advance of the meeting as well as a current copy of the most recent IEP if you need one
  - ☐ Your approval or disapproval of any team member excusal request

**ORGANIZE!** After receiving your invitation to your child's IEP meeting, organize your child's records/files. If you are missing any important documents, ask your child's school for a copy.

Your child's records/files should include (as appropriate for your child):

- ☐ Current and past IEPs and Report cards
- ☐ Work samples and Evaluation/assessment results
- ☐ Progress reports on academics and IEP goals
- ☐ Notes/email/phone call logs of communication about your child
- ☐ Functional Behavior Assessments (FBA)
- ☐ Behavior Intervention Plans (BIP)
- ☐ Other documents, such as Person-Centered Plan, tutor reports, behavior logs/ reports, discipline referrals, medical records, therapy/ treatment reports, RtI supports, specific information provided by you as the parent, etc.



# YOU ARE THE EXPERT

**PREPARE!** As you prepare for the IEP meeting, review your child's records/files and consider the following:

**1. What has been accomplished?**

**2. What has worked well?**

**3. What needs more work?**

**4. What are my concerns? What are my child's concerns?**

- ☐ Visit WI FACETS web site, ***wifacets.org***, to review the following tools:
  - Positive Student Profile • Blank IEP documents and other worksheets or forms • WI DPI Policies Governing Services for Children with Disabilities • WI Procedural Safeguards Parents' Rights • Special Education in Plain Language, \* or watch WI FACETS archived IEP trainings.
- ☐ Write down and prioritize a list of any questions, concerns or requests that you have.
- ☐ Create a vision statement. Consider your and your child's hopes and dreams for the future.
- ☐ Make copies or ask the school to make copies of your agenda (those topics or issues that you want to discuss and address).
- ☐ Gather supporting documents such as private evaluations, therapist notes, research-based fact sheets, records of past trials, etc.
- ☐ Ask your child about how things are going. Is there something about school that your child wants to discuss at the IEP meeting?
- ☐ Prepare your child to participate in the meeting, if they are attending.
- ☐ Consider bringing pictures or a short video of your child to the meeting. Give or send a reminder to anyone you have invited to the meeting.
- ☐ Ask the teacher(s) about your child's progress and any specific concerns or ideas they have for the upcoming year.



## STEP 02

### The IEP Meeting

**PARTICIPATE!** It is important for every member of the IEP Team, including you as an equal partner, to be prepared to work together. The Team must consider and use a wide variety of data and other information, including the information you share, to create an IEP that is appropriate for your child.

The following steps will help you to effectively participate in the IEP meeting:

- ☐ Remember to bring your notes, records and any other information you need for the meeting. Don't forget a pencil/pen/paper and remember to bring your child's pictures or video if desired.
- ☐ Arrive 10-15 minutes before the meeting.
- ☐ Connect with any person(s) that you invited before entering meeting.
- ☐ Request introductions, if necessary, and clarify everyone's role at the meeting. Ask who is serving as the Local Education Agency representative (LEA).
- ☐ Ask who is responsible for taking the meeting notes.
- ☐ Provide any parent input and concerns in advance to your child's teacher.
- ☐ Share your ideas, opinions and feelings throughout the meeting.
- ☐ Listen carefully. If something is not clear, ask questions before moving forward.
- ☐ Request a brief break if you need one.

***Remember that YOU are the expert on your child!***

**Before the meeting ends:**

- ☐ Review the meeting notes for accuracy.
- ☐ Check to see if all your concerns have been addressed.
- ☐ Make sure that the wording throughout the IEP is clear and specific enough to be understood by anyone – even if they were not present at the meeting!!
- ☐ Schedule another IEP meeting if there is an unresolved issue or if you ran out of time.
- ☐ Identify who is responsible for each part of the IEP and any follow-up activity.
- ☐ If you disagree with any part of the IEP, state your concern(s) in writing on the IEP form.
- ☐ Thank the other team members for their participation, efforts and ideas for your child.



**IMPORTANT NOTE:**

You are entitled to a copy of your child's completed IEP. If it is not offered to you, ask for a copy before leaving. Be sure to take it with you even if a final copy will be sent.

A photograph of three students, two girls and one boy, looking at a tablet together. The image is overlaid with a blue gradient. A red speech bubble is positioned on the right side of the image.

## 14 AND OVER

**TRANSITION PLANNING**  
as part of the IEP is required to begin in Wisconsin  
at age 14. This means that:

- ☐ A Post-Secondary Transition Plan (PTP) is required to be completed with the student based on his or her strengths, needs, interests and preferences.
- ☐ The PTP is based on an age-appropriate transition assessment.
- ☐ The PTP helps students and their families plan for life after high school by setting specific goals in the areas of: Employment; Post-Secondary Education/Training; Independent Living (when the IEP team deems it appropriate)
- ☐ The PTP includes transition services appropriate to help the student in meeting each transition goal (such as: DVR, ADRC, Post Education/training programs, etc.)

**NOTE:** Student rights are transferred to the student at age 18 (the age of majority). To continue to participate in your child's IEP and have decision-making rights, permission must be given by the student. (For more information, see "What You Should Know About Your Legal Rights & Responsibilities" (<https://www.wisbar.org/forPublic/ForEducators/Documents/What-You-Should-Know.pdf>))



# THANK YOU

## STEP 03

### After The IEP Meeting:

**FOLLOW UP!** Congratulations, you have completed an important step in your child's education. This is a great time to reflect on your IEP meeting experience and to make some notes about how to improve this process for the next meeting.

- ☐ Write "Thank You" notes to those you invited and other team members.
- ☐ Write notes of clarification to address any concerns, questions, overlooked areas, etc., if needed.
- ☐ If there is disagreement with any outcome, or if parents have questions about decisions made in the IEP meeting, contact WI FACETS to discuss your rights and/or possible dispute resolution options.
- ☐ Review the IEP with your child when appropriate, discuss expectations, and monitor his/her successes and concerns.
- ☐ Consider sharing a copy of the IEP with other professionals working with your child.
- ☐ Review the IEP frequently in order to check progress.
- ☐ Ensure ALL of your child's teachers and support staff are aware that the IEP has been updated.

## REMEMBER...

The end of the IEP meeting is the beginning of an appropriate education for your child.

Stay informed and knowledgeable throughout the year:

- ☐ **Monitor** your child's education to ensure proper implementation of the IEP and to ensure that your child is making adequate progress.
- ☐ **Communicate** with your child's teachers and others. Share successes and address any issues as they arise.
- ☐ **Make Time** to review the IEP periodically and request an IEP meeting to discuss changes if needed.
- ☐ **Contact** the WI FACETS Help Desk at 1-877-374-0511 to ask questions or visit [wifacets.org](http://wifacets.org) for valuable resources.

**STAY  
INFORMED**



WI FACETS is home to Wisconsin's Statewide Parent Training and Information Center (PTI). Our services are free to parents, students and professionals.



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