

IEP Procedures and Checklist

Date of IEP: _____ Case Manager: _____

Student Name: _____ Parent/Guardian Name(s) _____

- *If there are any concerns or special requests, please notify Administrator before IEP.*
- *This form is to be filled out in preparation of the meeting. Prior to the meeting, a copy of the completed form is to be given to the administrator attending the meeting.*

What is the Purpose of the Meeting?

**** Use corresponding Flow Chart to fill in this box ***

IEP Process Agenda/Tasks	X or N/A	Corresponding Documents	Notes
Admin or Case Manager: introductions, purpose of the meeting, reviews confidentiality, and checks for current parent contact information.		Procedural Safeguards, MaineCare Notice, Sign-In Sheet	
Case Manager obtains seven-day waiver signature, if needed.		AWN	
Admin or Case Manager requests parent/guardian(s) to share their concerns for their child and/or the program.		Draft IEP	
Admin or Case Manager requests student to share his/her concerns for him/herself and/or the program.		Draft IEP	
Teachers review student performance in general education setting. Case Manager reads reports for teachers not in attendance.		IEP Teacher Report(s)	
Case manager reviews student progress on IEP goals, reviews reports from Speech, OT, PT, and other service providers if applicable.		Data Reports IEP Support Service Report(s)	
Case Manager reviews both formal & informal assessments & evaluations. (Examples of data: grades, SWIS data/behavior data, AIMSweb, observations, progress on standards/learning targets, evaluation reports.)		Data Reports Related Reports	
Case Manager reviews special education Eligibility Identification. Referral or Re-evaluation: Case Manager reviews and completes eligibility forms with team.		LD form, ED form (not DOE required but district protocol), S/L form, Adverse Effect Form	
If student is 16 or in 9th grade, Case Manager facilitates discussion of transition plan (pre- & post- high school), including any outside agency reports. Student participates or student report is reviewed.		Draft IEP Student Report	

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Case Manager reviews Academic, Functional and Developmental Needs of the student.		Draft IEP	
Case Manager reviews how the disability affects progress in the general curriculum and discusses with team the least restrictive environment (LRE).		Draft IEP	
Case Manager reviews Draft IEP: including draft goals , proposed services (remember ESY process), and special considerations. Goals should directly reflect the student's disability and its effects on classroom performance.		Draft IEP	
Case Manager addresses student needs in the area of behavior.		Data Reports (ex: SWIS, office referrals) Positive Behavior Support Plan, ITP, ICMP	
Case Manager reviews and determines with team the draft accommodations for the general education classroom.		Draft IEP	
Case Manager reviews and determines with team the draft accommodations for district and local assessments.		Draft IEP	
Case Manager asks IEP team to accept Draft IEP and proposes start date with team and parent.		Draft IEP	
If Initial Referral meeting and evaluations are ordered, Case Manager will obtain necessary signature.		Consent to Evaluate	
Case Manager determines if the re-evaluation is due prior to or by the next annual . If applicable, team will determine the needed evaluations. Case Manager proposed aligning dates if applicable.		File Review Form Future Recommendation Form	
Case Manager obtains any other necessary signatures.		Speech, OT, and/or PT, ORFF, MaineCare consent forms (dates must coincide with IEP)	
Admin or Case Manager reviews mtg. determinations and asks team members, including the parent for questions and/or clarifications.		Proposed Determination	
Admin or Case Manager thanks team members for attending and adjourns meeting.			