

IEP Team Meeting Documents

- IEP Meeting Notification
- IEP Team Report
- Teacher Input for Initial Referral
- Referral for a Student Suspected of Having a Disability
- Referral for a Preschool or Kindergarten-age Child Suspected of Having a Disability
- Parent Questionnaire for a Preschool or Kindergarten-age Child
- Referral for Audiological Evaluation
- Parent Questionnaire
- Teacher Report for a Student
- Central Education Placement Team (CEPT) Referral Form
- Summary of Interventions
- CEPT Checklist
- Developmental and School History (CEPT)
- Returnee Plan for Regional Programs & CEPT
- Manifestation Determination Report

(Revised February 2014)

Formal and Informal Assessment Information

- IIT, SST, or problem-solving team information
- Work samples
- Test protocols
- Results of Identification Audiometry
- Additional information such as speech-language checklists, Communication Rating Scales, hearing aid check information, etc.

(Revised February 2014)

Data Collection

The following should be retained for three years:

- Samples of student work, observation logs, ESY data collection, Secondary Student Progress Report, or Performance that demonstrates progress toward IEP goals and objectives portfolio
- Student Support Plan

(Revised February 2014)

Assessments and Evaluations

- Reevaluation Report
- SLP, ADHD, ED, Autism, and/or DD Supplements
- Student Record Review Worksheet
- Parental Consent for Evaluation or Reevaluation
- Educational Assessment Report
- All other assessment and medical report(s) from any discipline (e.g. Speech-Language, Psychological, Occupational Therapy, Physical Therapy, Vision, Hearing, Adapted P.E., etc.)
- Letter to Physician
- Physician's Assessment Report
- Review of Independent Assessment
- Adapted Physical Education Checklist
- Classroom Observation
- Educational Report for 3-4 yr. old Children
- Educational Report for 4-5 yr. old Children
- Report of Collaborative Assessments
- Educational Assessment Report for Students Who May be in Need of Only Speech-Language Services
- Functional Behavior Assessment (FBA) – if separate document

Individualized Education Program Forms

- Parental Input for IEP Development
- Teacher Input for IEP Development
- IEPs – initial, annual, reevaluation, ESY, amendment(s)
- Behavior Intervention Plan (BIP)

(Revised February 2014)

Transition

Transition Documents (Level/Grade)

- Extended Transition Plan
- MAPS (MaGill Action Plan System)
- Transition Checklist(s)
- Student Interest Inventories

Transition Documents (14 and Older)

- Parent Questionnaires
- Career Activity Log/artifacts
- Project Discovery artifacts
- Completed application to the Developmental Disabilities Administration (DDA)
- Completed application to the Division of Rehabilitation Services (DORS)
- Signed receipt of *MSDE Transition Planning Guide*

(Revised February 2014)

Miscellaneous

- Note Taking Tool for Conferences
- Transportation Request Form
- Request for Records and Release of Records
- Parent Notice of Student Record Disposal
- Other correspondence
- Other forms

(Revised February 2014)

Medical Assistance

For students who receive services that are eligible for reimbursement, the following records must be retained for six years prior to destruction.

- Service provider logs or other documentation required for Medical Assistance reimbursement
- Service coordination forms that demonstrate eligibility for Medical Assistance reimbursement

(Revised February 2014)