

Annotated IEP Companion Checklist



The purpose of this document is to support the participation, development, and implementation of an Individualized Education Program (IEP). Each section provides questions to help guide discussion. Utilize the IEP Planning Notes column to support your planning and participation for an upcoming IEP meeting.

PaTTAN
Pennsylvania Training and
Technical Assistance Network



Sections	Content	IEP Planning Notes
Student Demographics and Team Meeting Information Annotated IEP Reference Page Number(s) 8-16	✓ Are all dates accurate? ✓ Are all required signatures included? ✓ If applicable, was written input received and included? ✓ Was the Medical Assistance Program Billing Notice discussed? ✓ Did you welcome the family to the meeting, and did you or the student (if present) introduce them to all of the team members? ✓ Have individuals invited by the family been recognized and introduced, and also added to the IEP attendance page? ✓ Are all federally mandated team members (and any members the family wants to have in attendance) present, or has the family given permission for them to miss the meeting? Did the absent members give their information to families ahead of time, so they would have time to review it?	
SECTION I Special Considerations the IEP Team Must Consider Before Developing the IEP Annotated IEP Reference Page Number(s) 17-23	✓ Have family members been meaningfully engaged in discussions about each of the special considerations? (Avoid just checking a box.) ✓ Have all special considerations been addressed in applicable sections of the IEP?	
SECTION II Present Levels of Academic Achievement and Functional Performance Annotated IEP Reference Page Number(s) 24-27	✓ Are current data included and summarized? ✓ Are data included related to the student's: • instructional and grade levels • progress toward annual goals • input from the general education teacher • state assessment results • parental concerns • strengths • needs – ◦ Do the student's needs match the most recent ER/RR? ◦ If so, are they addressed through an annual goal, SDI, Accommodation and/or Related Service? ✓ Are data included that address how the student's disability affects involvement and progress in the general education curriculum? ✓ Has the family had a chance to contribute their thoughts to this section? If not, consider asking open-ended questions. ✓ Is information in this section explained in a way that is easy to understand?	

Sections	Content	IEP Planning Notes
Section III Transition Services Annotated IEP Reference Page Number(s) 28-33	✓ Have post-school goals been developed? ✓ Are post-school goals linked to measurable annual goals? ✓ Are activities included? ✓ Has the IEP team discussed aspirations for the future? Consider asking open-ended questions. ✓ What connections can you make between the courses of study and the student's goals for their future? ✓ How do you explain to families how important it is for students to be involved in their own transition planning?	
Section IV Participation in State and Local Assessments Annotated IEP Reference Page Number(s) 34-42	✓ Is the student an English Learner? If not, check the second box under "Not Assessed." ✓ Are allowable accommodations listed needed and consistently used throughout the school year? ✓ If a family member asks, are you able to explain criteria necessary for the student to NOT participate in testing? ✓ Have the state and local assessments the student will be taking been appropriately marked (e.g., PSSA, PASA, WIDA, Keystone)?	
Section V Goals and Objectives Annotated IEP Reference Page Number(s) 43-46	✓ Are baseline data for each goal in the Present Levels of Academic Achievement and Functional Performance section or the goals themselves? ✓ Does each goal contain (1) condition, (2) the student's name, (3) clearly defined behavior, and (4) the performance criteria desired? ✓ Do the measurable annual goals align with the student and family's goals, hopes, and dreams for the future while supporting needs documented in the ER/RR, present levels, and special considerations? ✓ If the student is identified as gifted, is there a statement of the annual goals and short-term learning outcomes?	

Sections	Content	IEP Planning Notes
Section VI Special Education/ Related Services/ Supplementary Aids and Services/ Program Modifications Annotated IEP Reference Page Number(s) 47-57	✓ Are the SDIs, accommodations, program modifications, and/or supplementary aids and services written with specificity? Can you ensure that the student's needs, and the circumstances under which services are to be provided, are understandable by anyone reading/reviewing the IEP? ✓ Will any included related services (and the amount provided) enable the student to benefit from special education services? ✓ Have supports for school personnel been reviewed? ✓ Have all factors for ESY eligibility been considered? If eligible, are the details of ESY service provided? ✓ Have SDIs and ESY been thoroughly explained to the family?	
Section VII Educational Placement Annotated IEP Reference Page Number(s) 58-65	✓ Have the four questions in section A, "Questions for the IEP Team," been reviewed and discussed? ✓ Does the amount and type of special education support listed match question #7 on the NOREP/PWN form? Note: The IEP is developed first. The NOREP/PWN is developed AFTER the IEP. ✓ Is the location of where the IEP will be implemented included? ✓ Did you calculate "Amount of Special Education" based upon the percentage of time the student receives services from special education professionals (i.e., support from paraprofessionals and PCAs does not count) in a typical school day, regardless of location? ✓ Did you explain this section to ensure all in attendance understand?	
Section VIII PennData Reporting Annotated IEP Reference Page Number(s) 66-68	✓ Has PennData reporting been explained clearly, removing educational jargon, so all in attendance understand? ✓ Do the PennData calculations include all times the student spends in the regular education environment, including community-based instruction?	