



# The IEP Master Binder

This binder keeps your child's IEP records in one place.

When you can find a document quickly, you can raise a concern accurately, and you have what you need at every meeting.

This binder belongs to

|                   |  |                      |  |
|-------------------|--|----------------------|--|
| Child's full name |  | Date of birth        |  |
| School            |  | District             |  |
| Grade             |  | Eligibility category |  |
| Case manager      |  | Case manager email   |  |

The four dates that matter

| What                                     | Date |
|------------------------------------------|------|
| Current IEP start date                   |      |
| Annual review due within 12 months       |      |
| Reevaluation due, at least every 3 years |      |
| Next report card/progress report due     |      |

# Start here

## How to build the binder

Print this document, punch it, and put it in a one-inch three-ring binder with eight dividers. Then file the records you already have. Building the file now means you will have it when you need it.

## Three steps, this week

1. Build the eight tabs. The divider pages are in this document. Put each one in front of its section.
2. Request your child's records. Use the records checklist near the back of this document.
3. Fill in the cover page. Names, dates, and deadlines in one place, at the front.

## Two practices to keep

1. Put it in writing. A verbal promise is not a service. An email with a date on it is evidence. After every phone call and every meeting, send a short email summarizing what was said.
2. File it the day it arrives. Keep everything related to the IEP. File each item as soon as you receive it, so you can find it when you need it.

What is in this binder

| Section                      | What it is for                                                                        |
|------------------------------|---------------------------------------------------------------------------------------|
| Cover page                   | Your child's details and the four deadlines you will be asked about                   |
| Tabs 1 to 8                  | Divider pages, each listing exactly what belongs behind it                            |
| Communication log            | A full school year of dated entries, every call, email, and meeting                   |
| Progress monitoring calendar | The six moments in the year when you check in, and what to ask                        |
| Records checklist            | What to request from the school, including what they will not send unless you name it |

### *A note on privacy*

This binder holds sensitive information about your child. Keep it somewhere you control. You decide which private records the school sees. Once a document is placed in the school file, it stays there, so share one document at a time and keep a note of what you shared and when.

# The eight tabs

Eight dividers, in this order. The divider pages follow; print them and put each one in front of its section.

| TAB                                                                                                     | SECTION                               | WHAT GOES HERE                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1                                                                                                       | <a href="#">Rights &amp; Law</a>      | Your current Procedural Safeguards Notice. Your state's complaint form, blank and ready. IDEA parent rights summary and the plain language glossary. Your state department of education special education contacts.                         |
| 2                                                                                                       | <a href="#">Current IEP</a>           | The current IEP, every page, including signature pages. Every Prior Written Notice issued during this IEP year. Consent forms you signed this year.                                                                                         |
| 3                                                                                                       | <a href="#">Previous IEPs</a>         | All past IEPs, newest on top. Prior Written Notices from earlier years. Keep a minimum of three years.                                                                                                                                      |
| 4                                                                                                       | <a href="#">Evaluations</a>           | Every evaluation conducted by the school includes its date. Any Independent Educational Evaluations. Private assessments you have shared with the school. Reevaluation reports and raw test data.                                           |
| 5                                                                                                       | <a href="#">Progress Data</a>         | Every progress report on IEP goals, newest on top. Report cards and progress reports arrive with them; keep the pair together. Standardized test results. Your own observation notes, dated. Service logs showing actual minutes delivered. |
| 6                                                                                                       | <a href="#">Correspondence</a>        | Every email from the school is printed with its date visible. Letters you sent and letters you received. Your Parent Concerns Letters. Post-meeting follow-up emails.                                                                       |
| 7                                                                                                       | <a href="#">Meeting Notes</a>         | Your notes from every meeting. Use Template 4C. Date, time, and who was present. Verbal commitments, who said it, and what they promised. Topics that were skipped, rushed, or tabled.                                                      |
| 8                                                                                                       | <a href="#">Medical &amp; Private</a> | Private therapist or provider reports you have chosen to share. Doctor letters and medical documentation. Diagnosis records.                                                                                                                |
| <p><b>The rule.</b> File it the day it arrives. Never throw away anything related to the IEP. Ever.</p> |                                       |                                                                                                                                                                                                                                             |

# Rights & Law

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## WHAT GOES BEHIND THIS TAB

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- Your current Procedural Safeguards Notice
- Your state's complaint form, blank and ready
- IDEA parent rights summary and the plain language glossary
- Your state department of education special education contacts

# Current IEP

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## WHAT GOES BEHIND THIS TAB

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- The current IEP, every page, including signature pages
- Every Prior Written Notice issued during this IEP year
- Consent forms you signed this year

# Previous IEPs

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## WHAT GOES BEHIND THIS TAB

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- All past IEPs, newest on top
- Prior Written Notices from earlier years
- Keep a minimum of three years

# Evaluations

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## WHAT GOES BEHIND THIS TAB

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- Every conducted by the school evaluation, with its date
- Any Independent Educational Evaluations
- Private assessments you have shared with the school
- Reevaluation reports and raw test data

# Progress Data

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## WHAT GOES BEHIND THIS TAB

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- Every progress report on IEP goals, newest on top
- Report cards, progress reports arrive with them, keep the pair together
- Standardized test results
- Your own observation notes, dated
- Service logs showing actual minutes delivered

# Correspondence

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## WHAT GOES BEHIND THIS TAB

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- Every email with the school, printed with its date visible
- Letters you sent and letters you received
- Your Parent Concerns Letters
- Post meeting follow-up emails

# Meeting Notes

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## WHAT GOES BEHIND THIS TAB

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- Your notes from every meeting. Use Template 4C
- Date, time, and who was present
- Verbal commitments, who said it, and what they promised
- Topics that were skipped, rushed, or tabled

# Medical & Private

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## WHAT GOES BEHIND THIS TAB

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- Private therapist or provider reports you have chosen to share
- Doctor letters and medical documentation
- Diagnosis records

## Communication & advocacy log

One line for every call, email, meeting, and document. Fill it in the same day, while the details are accurate. Twelve months follow, August through July.

### HOW TO USE IT

- Log the **date**, **who** you contacted, **what** you asked or were told, and **what came back**.
- If a response was promised, write the date it is due in the last column and circle it.
- If a promise was verbal, log it here **and** send an email confirming it the same day.
- A blank in the response column after the due date is itself a finding. Do not erase it.

**Keep the emails as well.** This log records what happened. File the printed emails in Tab 6.

### FILLED IN EXAMPLE

| DATE   | WHO                   | WHAT I ASKED OR WAS TOLD                                 | RESPONSE / OUTCOME                                 | DUE    |
|--------|-----------------------|----------------------------------------------------------|----------------------------------------------------|--------|
| 10 Oct | R. Alvarez, case mgr. | Emailed asking for October speech service minutes        | Sent log 14 Oct, 30 min delivered, IEP requires 60 |        |
| 14 Oct | R. Alvarez, case mgr. | Asked in writing for a plan to make up 30 missed minutes | No reply                                           | 24 Oct |

**August**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**September**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**October**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**November**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**December**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**January**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**February**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**March**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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**April**

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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## May

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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## June

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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## July

| DATE | WHO | WHAT I ASKED OR WAS TOLD | RESPONSE / OUTCOME | DUE |
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MARK THESE ON YOUR OWN CALENDAR

## Progress monitoring calendar

Six moments in every school year. Write the actual dates in the last column during the week the IEP starts and add them to your own calendar.

| WHEN                                 | WHAT TO DO                                                                                                                                                                                                                                                        | MY DATE |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| <b>6 weeks after the IEP begins</b>  | Email the case manager: Are all services being delivered as written, in the setting specified, by the named provider? Ask for actual minutes delivered.                                                                                                           |         |
| <b>Each report card period</b>       | Progress reports are distributed with report cards. Review each one against every goal. Is progress on pace for the annual target? If a progress report does not arrive with the report card, that is a missing document; log the date and ask for it in writing. |         |
| <b>3 months after the IEP begins</b> | Request current data on every goal, including the baseline each started from and the measurement used.                                                                                                                                                            |         |
| <b>Midyear (January)</b>             | If progress is insufficient, request an IEP meeting in writing to revise goals or increase services. Ask for two dates within 30 days.                                                                                                                            |         |
| <b>1 week before the annual IEP</b>  | Request records and the draft IEP. Review this year's progress. Draft your concerns letter.                                                                                                                                                                       |         |
| <b>Annual review meeting</b>         | Full IEP review. Bring this binder, your notes, and your written concerns.                                                                                                                                                                                        |         |

## THE 6-WEEK EMAIL, WORD FOR WORD

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Hi [Name], [Child] is six weeks into the current IEP, and I want to confirm that we are on track. Could you send me, in writing:

1. Confirmation that each service in the IEP is being delivered at the frequency and in the setting written, including the actual minutes delivered so far.
2. Any early data on the annual goals.
3. The name of the provider delivering each service.

If any service has not started or has been reduced, please let me know the reason and the plan to make up the missed time. Thank you, I am glad to talk by phone as well, and I will follow up in writing afterward.

## THE MIDYEAR EMAIL, WORD FOR WORD

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Hi [Name], we are halfway through the IEP year. Please send me the current progress data for each annual goal, including the baseline each goal started from and the measurement used.

I am specifically asking whether [Child] is on pace to meet each annual target by [end date]. If any goal is not on pace, I am requesting an IEP team meeting to revise the goal or increase services. Please propose two dates in the next 30 days.

## WHEN THE ANSWER IS NO, SAY THIS OUT LOUD

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*"I understand the team is declining that request. I would like Prior Written Notice explaining the refusal, the data it was based on, and the options the team considered and rejected."*

Asking for Prior Written Notice is not hostile. It is the mechanism the law provides, and it turns a verbal no into a document you can act on.

BEFORE ANY MEETING

What to ask the school for

Schools provide the records you specifically name. Tick every line you want, then list the ticked items in your records request letter (Template 2D). Under FERPA, the school has 45 days to respond.

THE OBVIOUS ONES

- ☐ All current and past IEPs, every version, with dates
- ☐ All evaluations and assessments, conducted by the school and district, are funded
- ☐ Progress reports on IEP goals, every reporting period
- ☐ All Prior Written Notices issued
- ☐ Report cards, transcripts, and attendance records
- ☐ Discipline records, including any manifestation determination reviews
- ☐ Every procedural safeguards notice provided to me, with dates

THE ONES THEY WILL NOT SEND UNLESS YOU NAME THEM

- ☐ **Raw test data, scoring protocols, and evaluator worksheets** from every assessment
- ☐ **Internal evaluator notes, draft reports, and working documents**
- ☐ **All emails between staff about my child**, including internal emails never sent to me
- ☐ **Service logs** showing actual minutes delivered, by provider, by week
- ☐ Meeting notes or summaries from any IEP, eligibility, or team meeting
- ☐ Third-party reports that the school received and placed in my child's file
- ☐ Any intervention data collected before referral (RTI or MTSS)

**Ask for electronic copies.** PDFs cost the school nothing, arrive faster, and are searchable. Ask them to notify you of any copying fee before mailing the paper.

TRACK THE REQUEST

| DATE SENT | SENT TO | 45-DAY DEADLINE | RECEIVED? | STILL MISSING |
|-----------|---------|-----------------|-----------|---------------|
|           |         |                 |           |               |
|           |         |                 |           |               |
|           |         |                 |           |               |
|           |         |                 |           |               |

**When the records arrive, review** them within two weeks. Note anything missing, inaccurate, or concerning; you have the right to request corrections, and a gap in the file is itself information.