

Annotated IEP Checklist

ITEM(s)	IDEA '97 REGULATIONS	REGULATION CITATION
Parent/Student — IEP 1		
<input type="checkbox"/> consider input from parents	Parent participation.	20 U.S.C § 614 (d) (1) (B) (i)
Student Strengths and Key Evaluation Summary — IEP 1		
<input type="checkbox"/> consider results of initial evaluation or most recent evaluation	Initial evaluations. Reevaluation. IEP meetings. Development, review, and revision of IEP.	20 U.S.C § 614 (a) (b) and (c) 20 U.S.C § 614 (a) (2) 20 U.S.C § 613 (a) (1); 614 (d) (4) (A) 20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> consider assessment results from MCAS and district-wide assessments	Development, review, and revision of IEP	20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> consider input from parent, special educators and general education teachers	IEP meetings. Parent participation. Development, review, and revision of IEP.	20 U.S.C § 613 (a) (1); 614 (d) (4) (A) 20 U.S.C § 614 (d) (1) (B) (i) 20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> review existing annual goals and address any lack of expected progress	IEP meetings.	20 U.S.C § 613 (a) (1); 614 (d) (4) (A)
<input type="checkbox"/> review progress in the general curriculum	IEP meetings.	20 U.S.C § 613 (a) (1); 614 (d) (4) (A)
Vision Statement — IEP 1		
<input type="checkbox"/> beginning at the age 14, the vision statement should be based on the individual student's needs taking into account the student's preferences and interests and include desired outcomes in adult living, post-secondary and working environments	Transition services. Development, review, and revision of IEP.	20 U.S.C § 614 (d) (1) (A) (i) (VIII) 20 U.S.C § 614 (d) (3) and (4) (B) and (e)
General Curriculum — IEP 2		
<input type="checkbox"/> discuss how the student's disability affects the student's involvement and progress in the general curriculum (i.e. the same curriculum as used with nondisabled students)	Content of IEP.	20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)

Annotated IEP Checklist (continued)

ITEM(s)	IDEA '97 REGULATIONS	REGULATION CITATION
Other Educational Need(s) — IEP 3		
<input type="checkbox"/> for the student whose behavior impedes own learning or the learning of others, consider student's behavior including positive behavioral interventions, ability to follow school discipline code, any needed code modifications and the possible need for a functional behavioral assessment	Development, review, and revision of IEP.	20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> for the student with Limited English Proficient (LEP), consider language needs and document whether the special education and related services will be provided in a language other than English	Development, review, and revision of IEP.	20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> for the student who is blind/visually impaired, consider need for instruction in Braille and use of Braille unless the Team considers such instruction in not appropriate for the student	Development, review, and revision of IEP.	20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> for the student who is deaf/hearing impaired, consider language and communication needs, opportunities for direct communication, academic level and full range of needs including direct instruction in a child's language and communication mode	Development, review, and revision of IEP.	20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> for all students, consider the communication needs	Development, review, and revision of IEP.	20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> for all students, consider whether assistive technology is needed	Assistive technology Development, review, and revision of IEP.	20 U.S.C § 614 (d) (3) (B) (v) 20 U.S.C § 614 (d) (3) and (4) (B) and (e)
<input type="checkbox"/> for children ages 3 to 5, consider, as appropriate, how the disability(ies) affects the child's participation in appropriate activities <i>Note: By the third birthday of a child eligible for services, an IEP or IESP must be developed and being implemented.</i>	Content of the IEP. <i>Individualized family service plan.</i> <i>Free appropriate public education (FAPE).</i> <i>Transition of children from Part C to preschool programs.</i> <i>When IEPs must be in effect.</i>	20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii) 20 U.S.C § 636 (d) 20 U.S.C § 612 (a) (1) 20 U.S.C § 612 (a) (9) 20 U.S.C § 614 (d) (2)
<input type="checkbox"/> beginning no later than the first IEP developed when the eligible student with a disability is 15, the Team considers the student's need for transition services and documents their discussion. If appropriate the IEP includes a statement of needed transition services.	Transition Services. Parent participation. Content of the IEP.	20 U.S.C § 614 (d) (1) (A) (i) (VIII) 20 U.S.C § 614 (d) (1) (B) (i) 20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)

Annotated IEP Checklist (continued)

ITEM(s)	IDEA '97 REGULATIONS	REGULATION CITATION
Other Educational Need(s) — IEP 3		
<input type="checkbox"/> for each student beginning at age 16 (or younger if appropriate) a statement of transitional services for the student	Transition Services. Parent participation. Content of IEP.	20 U.S.C § 614 (d) (1) (A) (i) (VIII) 20 U.S.C § 614 (d) (1) (B) (i) 20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)
Current Performance Levels/Measurable Annual Goals — IEP 4		
<input type="checkbox"/> include a statement of child's present levels of educational performance and a statement of measurable annual goals including benchmarks or short-term objectives	Content of IEP. IEP — accountability.	20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii) 20 U.S.C § 614 (d) (1) (A) (i) (I-IV)
Service Delivery — IEP 5		
<input type="checkbox"/> consider the students unique needs and not existing programs and services when determining service delivery	Assistive technology service. Related service. Special education. Supplementary aids and services. Transition services. Content of IEP.	20 U.S.C §614 (d) (3) (B) (v) 20 U.S.C § 602 (26) 20 U.S.C § 602 (29) 20 U.S.C § 602 (33) 20 U.S.C § 614 (d) (1) (A) (i) (VIII) 20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)
Nonparticipation Justification — IEP 6		
<input type="checkbox"/> justify why the student is unable to be educated and participate with other children with and without disabilities in activities	Content of IEP. Nonacademic settings.	20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii) 20 U.S.C § 612 (a) (5)
Schedule Modification — IEP 6		
<input type="checkbox"/> discuss and document whether a student needs a longer or shorter school day or year	Extended school year services. Content of IEP. <i>Contents of the IEP.</i>	20 U.S.C § 612 (a) (1) 20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii) <i>§ 603CMR 28.05 (4)(d) (State Regulation)</i>

Annotated IEP Checklist (continued)

ITEM(s)	IDEA '97 REGULATIONS	REGULATION CITATION
Transportation — IEP 6		
<input type="checkbox"/> discuss and record whether the student needs transportation as a result of the disability(ies)	<p>Related services.</p> <p>Nonacademic services.</p> <p>Location of service; transportation.</p> <p><i>Transportation.</i></p>	<p>20 U.S.C § 602 (26)</p> <p>20 U.S.C § 612 (a) (5)</p> <p>20 U.S.C § 612 (a) (10) (A)</p> <p>§ 603CMR 28.05 (5) (State Regulation)</p>
State or District-Wide Assessment — IEP 7		
<input type="checkbox"/> discuss and document how the student with a disability will be included in state and district-wide assessments	<p>Participation in assessments.</p> <p>Content of IEP.</p>	<p>20 U.S.C § 612 (a) (16)</p> <p>20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)</p>
Additional Information — IEP 8		
<input type="checkbox"/> beginning no later than the first IEP developed when the eligible student with a disability is 15, the Team considers the student's need for transition services and documents their discussion. If appropriate the IEP includes a statement of needed transition services.	<p>Exception to FAPE for certain ages.</p> <p>Prior notice by the public agency; content of notice.</p>	<p>20 U.S.C § 612 (a) (1) (B)</p> <p>20 U.S.C § 614 (b) (1) and 615 (b) (3), (4), and (c)</p>
<input type="checkbox"/> for students 16 (or younger, if determined appropriate by the IEP Team) or older, when appropriate, discuss and <i>document</i> inter-agency responsibilities and any needed linkages	Content of IEP.	20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)
<input type="checkbox"/> for a student two years before graduation or reaching age 22 who may require continuing special services, discuss and <i>document</i> the need for a referral to an area human service agency office or the Bureau of Transitional Planning	<p>Required under state law M.G.L. c.71, §12A-§12C (Known as Chapter 688)</p> <p><i>Contents of the IEP.</i></p>	§ 603 CMR 28.05(4)(c) (State Regulation)
<input type="checkbox"/> for students whose IEPs have transition services that a participating agency fails to provide, identify alternative strategies to meet these objectives	<p>Agency responsibilities for transition services.</p> <p><i>Reconvene Team as necessary to address this issue.</i></p>	<p>20 U.S.C § 614 (d) (1) (A) (VII)</p> <p>20 U.S.C § 614 (d) (6)</p>
<input type="checkbox"/> for students at least one year before age 18, discuss and <i>document</i> the transfer of rights discussion	Content of IEP.	20 U.S.C § 614 (d) (1) (A) and (d) (6) (A) (ii)
<input type="checkbox"/> for a transition-aged student not in attendance, <i>document</i> other steps taken to ensure that the student's preferences and interest were considered	IEP team.	20 U.S.C § 614 (d) (1) (B)

Annotated IEP Checklist (continued)

ITEM(s)	IDEA '97 REGULATIONS	REGULATION CITATION
Additional Information — IEP 8 (continued)		
<input type="checkbox"/> when parents are not in attendance, the school district should <i>document</i> effort made to ensure parent participation and to insure a mutually agreed upon time and place	Parent participation.	20 U.S.C § 614 (d) (1) (B) (i)
Parent Signature — IEP 8		
<input type="checkbox"/> immediately following the development of the IEP, the district shall provide the parent with a copy of the proposed IEP along with the required notice	<i>Required under state regulation.</i> <i>Parent response to proposed IEP and proposed placement.</i>	<i>§ 603 CMR 28.05(7)</i> <i>(State Regulation)</i>