

Organizing your Child's IEP documents

It is very important and, yes, time-consuming, to organize your child's IEP documents, but it must be done. Set aside time once a month to update your child's binder and the task will be manageable.

General Tips:

- All documents should be placed in a three ring binder and hole-punched on the left side. When hole-punching, make sure you do not destroy any content.
- When you receive a document, write in pencil on the back of the first page: "Received (date)" or buy a "received" stamp.
- Keep all documents received from the school district; you never know when you may need them. Never throw away an "old" IEP; keep all IEPs.
- Never give anyone an original document.
- Never write on an original document. Instead, write on a sticky note and place it on the document.
- Keep a copy of all documents and notes you send in to the school district, including e-mails.
- Keep several examples of your child's school work every month. This includes not only homework from each subject, but also samples of handwriting and cutting ability, if your child has fine motor skill issues. These can be presented at IEP meetings to show progress or lack of progress.

File Order:

- **Telephone log:** A telephone log should be placed on the inside left cover of the binder. You may wish to use a simple telephone log, or the more complete journal page. See samples. If you choose to use the telephone log, be sure to note the person you spoke with, who placed the call, what was discussed and any follow up action needed.
- **Contact page:** The first page of your binder should be a contact page; a list of the names, addresses, telephone and facsimile numbers and e-mail addresses of selected school staff. This includes all teachers, therapists and the case-manager. See, sample Contact Page.
- **Table of contents:** The second page of your binder should be a table of contents, in the form of a chart showing what documents follow, including the date of each document, name of each document, its author and its importance. See, sample Table of Contents. For example, it may say: "May 1, 20__; PT evaluation; Jane Doe, PT; Continues with low muscle tone, decreased strength, stability and balance; poor grading of movement; delayed gross motor skills; only met 60% of last year's goals".
- **Outstanding issues:** The third page of your binder should include outstanding issues. If there is a document or information you are waiting to receive (some information from the case-manager, a report from a doctor so you may forward it to the school district, etc), it should be noted on this page.
- **Remainder of documents:** Here, you have two choices. You could either file the remainder of your documents in **date order**, with the oldest on the bottom and the newest on the top. Each document should be tabbed or labeled. Your other option is to

file documents by **category**, with a tab or label for each. This could include (listed here in alphabetical order):

- ABLLS
- Behavior issues
- Daily logs
- Extended school year
- File review summary (if you have reviewed your child's file at school and taken notes)
- General (yearly school calendar, back-to-school night papers)
- IEPs
- Independent evaluation
- Initial referral documents
- Legal
- Observation notes
- Progress reports/report cards
- Related services evaluation reports (Speech, OT, PT, education, psychological, social worker, audiology, etc)
- Transportation issues
- Your doctors' reports

The benefit of filing documents in date order is: a timeline, of sorts, is given. Where is your child at the moment and just how far has he or she progressed? Also, if there was ever any type of litigation filed (a complaint or due process), the attorney would surely ask to see your child's documents in this order.

The benefit of filing documents by category is: documents can be easily located. Additionally, the documents do not have to be categorized alphabetically, as above; they could be filed in order of what is important for your child.

The point is to be organized so it easy to prepare for IEP meetings and also to locate documents during IEP meetings.

Journal Page

Date: _____ Time: _____ am/pm

Name/Title of person spoke with: _____

Person who placed the call: _____

Subject: _____

Notes: _____

Follow up action needed: _____

By whom: _____

Contact Page

Name, address, telephone and fax numbers and e-mail addresses:

School Staff:

Your Child's physicians and therapists:

Other Parents:

Support Groups:
