

# Managing the Essential Forms

A parent’s walkthrough for tracking, understanding, and responding to the documents in your child’s educational review

A child with an IEP generates a surprising amount of paper. Report cards, progress reports, evaluations, re-evaluations, IEPs, amendments, meeting notices, consent forms, prior written notices, behavior intervention plans, and anything you send or receive in between. Most parents figure out halfway through their child’s school career that they should have been organizing this all along. This guide is for parents who want to get it right from the start — or clean it up now.

The documents fall into two categories: ones the school sends you, and ones you send the school. Both matter. A complete record of both is the single most useful thing you can keep — not because you’re planning to sue anyone, but because memory fails, staff turn over, and “what was agreed last year” stops being obvious within about six months.

## Why this matters even when things are going well

Parents sometimes treat documentation as something for when you’re in conflict with the school. The better frame: documentation protects the relationship. If “what we agreed” is written down, no one has to remember it perfectly, and disagreements stay focused on substance rather than on who-said-what.

## 1 Documents the School Sends You

These are the forms that arrive from the district, school, or IEP team. Your job is to read them carefully, respond when required, and file them.

Document	What It Is	What to Do With It
Report Card	General education grades issued on the same schedule as other students, typically quarterly.	Read in context — grades may reflect modified assignments. Compare to progress reports on IEP goals. File.
IEP Progress Report	Data on progress toward each IEP goal, issued on the same schedule as report cards.	Check that each goal has actual data, not just “making progress.” Flag vague reports at the next meeting. File.

Evaluation Report	Written results of psychoeducational, speech-language, OT, or other assessments conducted by the school.	Read carefully before the eligibility or IEP meeting. Request a copy in advance; you have the right to review. File permanently.
Reevaluation Report	Updated evaluation required at least every 3 years under IDEA, or sooner if requested.	Same as evaluation report. Compare to prior reports to track change over time. File permanently.
Draft IEP	Proposed IEP circulated before the meeting (not required, but best practice in many districts).	Read before the meeting; note questions and objections. Do not sign a draft — wait for the final version.
Final IEP	The binding plan after the meeting, with any agreed changes.	Read fully before signing. You can take it home. Once signed, file the original and give a copy to every teacher.
Prior Written Notice (PWN)	A written explanation the district must provide when it proposes or refuses to take action.	Read carefully — this is the district's official position. Preserves your right to challenge. File permanently.
Meeting Invitations	Formal notice of IEP, eligibility, or related meetings.	Confirm attendance. Request agenda and draft documents in advance. Note who will attend and request additional participants if needed.
Behavior Intervention Plan (BIP)	A written plan for addressing behaviors that interfere with learning, typically following a Functional Behavior Assessment (FBA).	Read carefully; the BIP must match the FBA's findings. File with the IEP.
Manifestation Determination	Required meeting determination when a student with an IEP faces suspension of more than 10 days.	Attend the meeting. Read the determination carefully. This document has legal significance if you later challenge the discipline. File permanently.

### Report card vs. progress report: know the difference

A report card shows how your child did in class. An IEP progress report shows how your child did on their IEP goals. These are different measurements and can tell different stories — a child may earn B's on modified work while making minimal progress on the underlying goal. Read both, and read them together.

## 2 Documents You Send the School

These are the documents that come from you. Every one of them should be in writing, dated, and kept as a copy in your records. “I talked to someone about that” is not a record. A dated email is.

Document	When You Send It	Why It Matters
Evaluation Request	When you believe your child needs special education services, or when an existing evaluation is out of date.	Starts the legal timeline — districts typically have 60 days from consent to complete an evaluation. Must be in writing to trigger the clock.
Meeting Request	When you want an IEP review, amendment, or additional meeting outside the annual cycle.	The district must respond. A verbal request is easy to lose; a written one creates a record and obligation.
Consent Forms	To authorize initial evaluation, initial placement in special education, re-evaluation, or release of records.	Keep a copy of what you signed. You can revoke consent in writing at any time, though the effect depends on what you're revoking.
Disagreement Letter	When you disagree with the IEP team's proposed action or decision.	Creates the formal record of the disagreement. Required before most dispute resolution procedures.
IEE Request	When you disagree with the district's evaluation and want an Independent Educational Evaluation at public expense.	The district must either agree to fund the IEE or file for due process to defend its evaluation. Written request starts this process.
Records Request	To obtain copies of your child's complete educational record.	Under FERPA, you have the right to inspect and obtain copies. District must respond within a reasonable time (45 days under federal law).

Formal Complaint	When you believe the district has violated IDEA or its implementing regulations.	Filed with the state education agency. Triggers an investigation with a defined timeline (typically 60 days for state complaint).
Due Process Complaint	When you cannot resolve a dispute through other means.	Formal legal procedure. Consider consulting an attorney before filing; the 2-year statute of limitations runs from when you knew or should have known of the alleged violation.

### 3 Templates for the Most Common Letters

Below are templates for the letters parents send most often. Adapt them to your situation. Keep them short, factual, and dated — a half-page letter that references dates and names outperforms a three-page letter that narrates a history.

#### Requesting an initial evaluation

##### EVALUATION REQUEST

Dear [Principal / Director of Special Education],

I am writing to formally request a comprehensive evaluation of my child, [Child's Full Name, DOB], currently in [grade] at [school], to determine eligibility for special education services under IDEA.

My concerns include: [brief list — e.g., persistent difficulty with reading, attention difficulties affecting classroom performance, speech that is hard for strangers to understand]. These concerns have persisted despite [any interventions tried].

Please confirm receipt of this request and the next steps, including the timeline for evaluation consent and completion.

I can be reached at [email] or [phone].

Sincerely,  
[Your Name]  
[Date]

#### Requesting an IEP meeting outside the annual cycle

### IEP MEETING REQUEST

Dear [Case Manager / CSE Chair],

I am requesting an IEP meeting for my child, [Child's Full Name], to address [specific concern — e.g., progress toward reading goals, an accommodation that isn't being implemented, a proposed schedule change].

I would appreciate receiving any draft materials, progress data, and the meeting agenda at least 48 hours before the meeting.

Please let me know what dates and times work for the team. I can be reached at [email] or [phone].

Sincerely,  
[Your Name]  
[Date]

### Requesting an Independent Educational Evaluation (IEE)

#### IEE REQUEST

Dear [Director of Special Education],

I received the [type of evaluation, e.g., psychoeducational evaluation] report dated [date] for my child, [Child's Full Name]. I disagree with the findings and am requesting an Independent Educational Evaluation at public expense, as provided under 34 CFR § 300.502.

Please provide the district's criteria for IEE providers and your list of approved evaluators. I understand that the district must either agree to fund the IEE or file for due process to defend its evaluation, without unnecessary delay.

Sincerely,  
[Your Name]  
[Date]

### Requesting your child's complete educational records

## RECORDS REQUEST

Dear [Principal / Records Custodian],

Under the Family Educational Rights and Privacy Act (FERPA) and 34 CFR § 99, I am requesting copies of the complete educational record for my child, [Child's Full Name, DOB, grade], including all IEPs, evaluations, progress reports, discipline records, communication logs, meeting notes, and any other records maintained by the district.

Please provide these within [45 days, which is the federal outer limit — many states require faster]. Let me know if there is a per-page copying fee.

Sincerely,  
[Your Name]  
[Date]

### One principle behind all of these letters

State what you want clearly in the first paragraph. Every one of these templates leads with the request, then explains. Administrators read a high volume of correspondence — a letter that buries the ask in the middle often gets a slower or incomplete response.

## 4 What to Look For in Each Document

Reading a document carefully is not the same as reading every word. For each type below, there are a few specific things to check. Once you know what to look for, you can get through a 25-page IEP in 20 minutes without missing what matters.

### Report card

- Are grades based on general curriculum, modified curriculum, or a mix? Ask if this is not clear.
- Do the grades align with what your child reports about how class is going? A large mismatch is worth a conversation.
- Are there teacher comments? Brief, generic comments often mean the teacher hasn't developed a detailed picture of your child yet.

### IEP progress report

- Does each goal have **data** — numbers, percentages, dates — or just narrative?
- Is the progress described in measurable terms that match the goal's criteria?
- Is the same vague language appearing on multiple reports (“making progress,” “continuing to work on...”)? That usually means no one is tracking the goal seriously.
- If a goal has been marked “mastered,” has a new goal replaced it, or is nothing targeted in that area?

### Evaluation report

- What tests were administered, and when? Tests from more than 3 years ago are typically out of date.
- Are results reported with scores and percentiles, or only narrative?
- Does the evaluator describe your child as a person — strengths, presentation, response to testing — or only as a list of deficits?
- Do the recommendations connect to the findings? Recommendations that don't follow from the data are often generic.
- Are there any obvious factual errors (wrong grade, wrong family information, wrong medical history)? These suggest the report was written hastily and may warrant re-reading for other issues.

### Final IEP

- Check Present Levels, Goals, and Services carefully (covered in detail in the IEP reading guide).
- Verify that accommodations listed in prior discussions are actually in the document.
- Confirm service minutes, frequency, group size, and provider are specified for each service.
- Check placement language and ensure least restrictive environment is documented.
- Confirm the document correctly reflects your child's disability category and eligibility.

### Prior Written Notice (PWN)

- What is the district proposing or refusing?
- What is the district's stated reason?
- What data or evaluations did the district rely on?
- What other options were considered and rejected, and why?
- If any of these sections is missing or thin, the PWN is incomplete — which is itself a procedural issue.

## 5 A Filing System That Actually Works

Over a typical K–12 career, a child with an IEP generates hundreds of pages of documents. Without a system, you will lose things you need. With a simple system, you can find any document in under five minutes.

### A workable structure

- **One binder or digital folder per school year.** Start fresh each September.
- **Within each year, five sections:** (1) IEPs and amendments, (2) evaluations, (3) progress reports and report cards, (4) correspondence (everything you sent and received), (5) meeting notes.
- **A chronological running log** for phone calls and in-person conversations — date, who you spoke with, what was discussed, what was agreed.
- **A permanent folder**, separate from the yearly binders, for evaluations, medical records, and anything with multi-year relevance.

### Digital vs. paper

Either works. The common mistake is using both inconsistently — some documents in email, some printed, some in a shared drive no one remembers the login for. Pick one system. If digital, back it up somewhere you control (personal email, cloud drive, external drive) — do not rely on a work email or a school parent portal for long-term storage.

### Scan everything the school sends home

Paper documents get lost in backpacks, spilled on at dinner, and misfiled. When your child comes home with an IEP, a progress report, or a consent form, scan it (your phone works) and file the digital copy before anything else happens to the paper. This one habit prevents most document-loss problems.

## 6 The Timelines You Need to Know

Many of these documents start or end legal clocks. Missing a deadline can cost you rights; understanding the deadlines means you can plan around them. These are the federal minimums — some states are shorter. Check your state’s rules.

Event	Timeline	Notes
Initial evaluation	60 days from parental consent (federal).	Some states (including New York) operate on a 60-calendar-day rule with specific exceptions; others are shorter. Confirm your state’s rule.
Initial IEP meeting after eligibility	30 days from eligibility determination.	The IEP must be in place before services begin.
Annual IEP review	At least once every 12 months.	Meeting must occur by the anniversary of the prior IEP.
Reevaluation	At least once every 3 years.	May be waived by written parent agreement if not needed. May occur sooner if requested.
Records request response	Without unnecessary delay; no more than 45 days (FERPA).	Many states require faster response.
IEE decision	“Without unnecessary delay.”	Not a specific number of days, but district must act — either fund the IEE or file for due process promptly.
State complaint investigation	60 days from filing (federal).	State education agency conducts the investigation.

Due process statute of limitations	2 years from when you knew or should have known of the violation.	A few states have different limits. Do not wait; once the clock runs, you lose the right to file.
Manifestation determination	Within 10 school days of decision to change placement for discipline.	Required before a student with an IEP can be suspended for more than 10 cumulative days in a school year.

### A timeline tip

When the school tells you a deadline verbally, confirm it in writing. “Just confirming what I heard — the evaluation will be complete by [date]?” in a brief email. If the school misses the deadline, this email shows the deadline was understood, not something you invented after the fact.

## 7 What to Bring to Each Meeting Type

Every meeting involving these documents works better when you walk in with the right materials. These are the basics for each type.

Meeting Type	What to Bring
Parent-teacher conference	Current IEP, recent progress reports, report card, one page of questions or concerns, any recent outside evaluations or medical updates.
IEP annual review	Current IEP, all progress reports from the year, report cards, work samples showing progress (or lack of it), outside evaluations, your written list of requested changes, a notepad.
Initial eligibility meeting	Your written evaluation request, any private evaluations or medical documentation, a written description of your concerns with specific examples, school history if you've transferred in.
Re-evaluation meeting	Prior evaluations (for comparison), current IEP, progress data, any changes in medical status or home circumstances, questions about what the new evaluation will cover.
Manifestation determination	IEP, BIP (if any), the specific discipline notice, any FBA, a list of any prior incidents and outcomes. Consider bringing an advocate or attorney for serious discipline.

Mediation or resolution session	Everything relevant to the dispute, your written statement of what you want resolved, your documentation of the disagreement. Consider bringing an advocate.
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## 8 Common Documentation Mistakes

<b>Signing documents at the meeting without reading them.</b>	You have the right to take any document home to review. Use that right, especially for IEPs and consent forms.
<b>Relying on verbal agreements.</b>	“We agreed on the phone” is not enforceable. Confirm every substantive agreement in writing, ideally with a same-day email summarizing what was decided.
<b>Throwing away or recycling old IEPs after the annual review.</b>	Prior IEPs show the trajectory of goals and services over time. Keep them permanently.
<b>Keeping only what the school sends, not what you send.</b>	Your outgoing letters, emails, and requests are often the most important records if a dispute arises. The school keeps copies of what they sent you; you have to keep your own.
<b>Asking for things by phone but not following up in writing.</b>	A phone request doesn’t start legal timelines and is easy to forget. Every important request should be in writing, even if you also made it by phone.
<b>Waiting to organize records until there’s a problem.</b>	Organizing several years of documents during a dispute is miserable. Ten minutes a month during normal times saves hours in a crisis.
<b>Losing track of what was agreed at a meeting.</b>	Send a post-meeting recap email within 48 hours, listing key decisions and next steps. This becomes the cleanest record of what was agreed.

## Annual Paperwork Checklist

At the end of each school year, confirm you have the following in your records for the year that just ended. A missing item is worth chasing down now, while the school still has it and the people involved still remember.

## Core documents

	Current IEP (signed, with all amendments)
	Any evaluations conducted this year
	All IEP progress reports for the year
	All report cards for the year
	Copies of all meeting notices received

## Correspondence

	Every email you sent or received about your child, organized chronologically
	Copies of all written requests you submitted
	Prior Written Notices received from the district
	Any consent forms you signed

## Meeting records

	Your notes from every meeting, dated
	Meeting attendee lists where applicable
	Post-meeting recap emails you sent
	Agendas and draft documents received before meetings

## Discipline records (if applicable)

	Any discipline notices received
	FBA and BIP documents (if any)
	Manifestation determination records (if any)

### A note on this guide

This guide is for general parent education. It is not legal advice. Timelines and specific procedures vary by state, and the rules change. If you are facing a compliance dispute or preparing for a formal procedure (state complaint, due process, mediation), consult a special education advocate or attorney who knows your state.