

Standardizing IEP Documentation

Use this worksheet to assess your current documentation practices and outline steps for increasing standardization across the district.



Why Standardization Matters

Standardized IEP documentation:

- Reduces errors and missing data points
- Improves the quality of data insights
- Strengthens collaboration among educators
- Reduces the documentation burden on staff

Reflection

What documentation challenges currently create the most friction for:

Special Education Teachers:

General Education Teachers:

Building Leaders:

District Leaders:

What Standardization Looks Like

Standardized documentation means your district is consistently:

- Tracking clearly defined data points in the same format
- Using shared naming conventions and terminology
- Recording information in a timely manner
- Writing clear and consistent documentation notes

Reflection

Rate your current documentation practices:

	Needs Improvement	Developing	Consistent
Defined data points for documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard naming conventions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timely documentation expectations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clear documentation guidelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Questions to Answer to Establish Documentation Standards:

Who documents what?

Ex: Case managers record service delivery while specialists document progress monitoring.

What information must be documented?

Ex: Goals, behavior intervention plans, service minutes, progress monitoring data, meeting notes.

What terminology will we use?

Outline and define your district and state's preferred language. Ex: Service Setting — Co-teaching, Pull-out, Self-contained, Virtual.

How should documentation occur?

Ex: Using a standardized template within the district IEP tracking system.

When should documentation be completed?

Ex: Within 24 hours of service delivery.
