

# Organizing Special Education Documents

The roadmap to your child's education



4440 N. First St. Fresno, CA 93726  
(559) 229-2000 TOLLFREE: (844) 445-0305  
[www.epuchildren.org](http://www.epuchildren.org)

# Why should I organize my documents?

**Easy access to records**

**Learn more about the student**

**To understand the needs/goals**

**Create a Paper Trail / Protect rights**

# Why should I organize my documents?

**More effective advocacy**

**Increased confidence / feel empowered**

**Gain credibility**

**Lower stress**

# Getting Started



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# Getting Started

Decide on a system that works best for you:



**Binder**



**Box**



**File**

**Digital**



**Combination**

# Digital Record Keeping

As technology advances electronic records are a great way to back up hard copies

Digital records may not be considered “official” so it is recommended to maintain paper records as well, especially those original signatures.



# Digital Record Keeping

- **save** space, reduce clutter
- **store** online, in a computer, on a CD, or flashdrive
- **access** all records from anywhere
- **share** documents with professionals easily.
- **“search”** documents for specific words
- **take** meeting notes on laptop or tablet



# Getting Started

- Assemble records you currently have
- Decide what will go in the binder
- Decide how to organize/store the rest
- Request records not in possession





# What documents should you keep?

- ☐ Special Education records:
  - ☐ IEPs
  - ☐ 504 Plans
- ☐ Evaluations/Consents
- ☐ Progress Reports
- ☐ Behavior Reports
- ☐ Procedural safeguards notice
- ☐ Release of information forms
- ☐ Notes/correspondence
- ☐ Communication log

# What documents should you keep?

## General Education Records

- ☐ Student handbook
- ☐ School calendar
- ☐ Work samples
- ☐ Attendance records
- ☐ Report cards
- ☐ Awards



# What documents should you keep?

## Optional Records to Keep

- ☐ Identification card
- ☐ Medical card
- ☐ Insurance
- ☐ Regional Center information
- ☐ Other agencies
- ☐ Outside therapies
- ☐ Information on disability





# Requesting records

What the law says:

## Family Educational Rights and Privacy Act FERPA

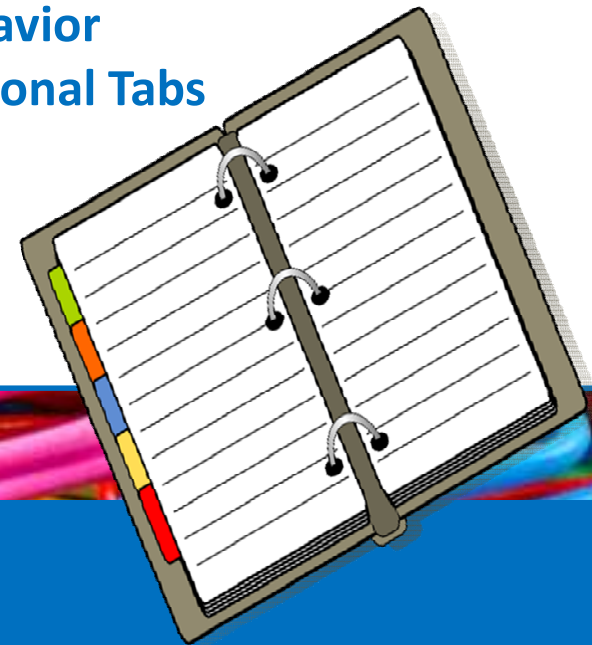
- Have the right to inspect and review “any and all” records the district keeps
- School records are “your” records
- Protects privacy by limiting access to records without parent consent



# Organizing the Binder

# Binder Organization: Important Elements

- **Binder / Cover**
- **IEP Binder Checklist**
- **Student Info Sheet**
- **One Page Profile**
- **IEP/504 at a Glance**
- **Pockets**
  - Notes / Free space to put papers to file
- **Tabs**
  - Communication/Contacts
  - Evaluations
  - IEPs/504s
  - Report Cards/Progress Reports
  - Sample work/testing
  - Behavior
  - Optional Tabs



# Binder Organization: Important Elements

- **Supply pouch**
  - Pens / pencils / highlighter
  - Sticky notes
  - Power cord
  - Hole punch
  - Section tabs
  - Flash drive / CDs
  - Extra clips



# One Page Profile Activity



# Binder Organization: Important Elements

## IEP binder checklist

Put the newest items on top in each section.

Goal	To be updated	Date updated		
Communication				
School contact list	Yearly or as new members join the team			
Communication log	Every time you have a meeting, call, or other important interaction with the school			
Letters and emails to and from the school	As often as needed (File after noting them in communication log)			
Evaluations				
Request/referral for evaluation	Every three years or more often, if needed			
Consent to evaluate	(Tip: Keep this — and the referral — on top to help check if the evaluation is done in a timely manner)			
School evaluations	At least every three years			
Private evaluations (if any)	Every time your child is evaluated privately			
IEP				
Copy of parent's rights & safeguards	Yearly			
IEP	Yearly or more often, if changes are made (and, if your child has had a 504 plan, include that too)			
Prior written notice and meeting notes	Yearly or more often, as needed			



## Parent Training & Information

### STUDENT INFO SHEET

Student's Full Name: \_\_\_\_\_

Home address: \_\_\_\_\_

Contact 1: \_\_\_\_\_ Relation \_\_\_\_\_

Phone: \_\_\_\_\_ (cell) \_\_\_\_\_ (work/home)

Email: \_\_\_\_\_

Contact 2: \_\_\_\_\_ Relation \_\_\_\_\_

Phone: \_\_\_\_\_ (cell) \_\_\_\_\_ (work/home)

Email: \_\_\_\_\_

Contact 3: \_\_\_\_\_ Relation \_\_\_\_\_

Phone: \_\_\_\_\_ (cell) \_\_\_\_\_ (work/home)

Email: \_\_\_\_\_

Doctor: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Doctor: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Medication: \_\_\_\_\_

\_\_\_\_\_

Allergies: \_\_\_\_\_


\_\_\_\_\_

The contents of this resource were developed under a grant from the U.S. Department of Education, #O308M000055. However, these contents do not necessarily represent the policy of the U.S. Department of Education, and you should not assume endorsement by the Federal Government.

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# Binder Organization: Important Elements



## Parent Training & Information

SCHOOL CONTACTS

Classroom Teacher: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

Special Education Teacher: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

School Psychologist: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

\_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_


\_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_

School Schedule:

1. _____	5. _____
2. _____	6. _____
3. _____	7. _____
4. _____	8. _____

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## Parent Training & Information

IEP AT A GLANCE

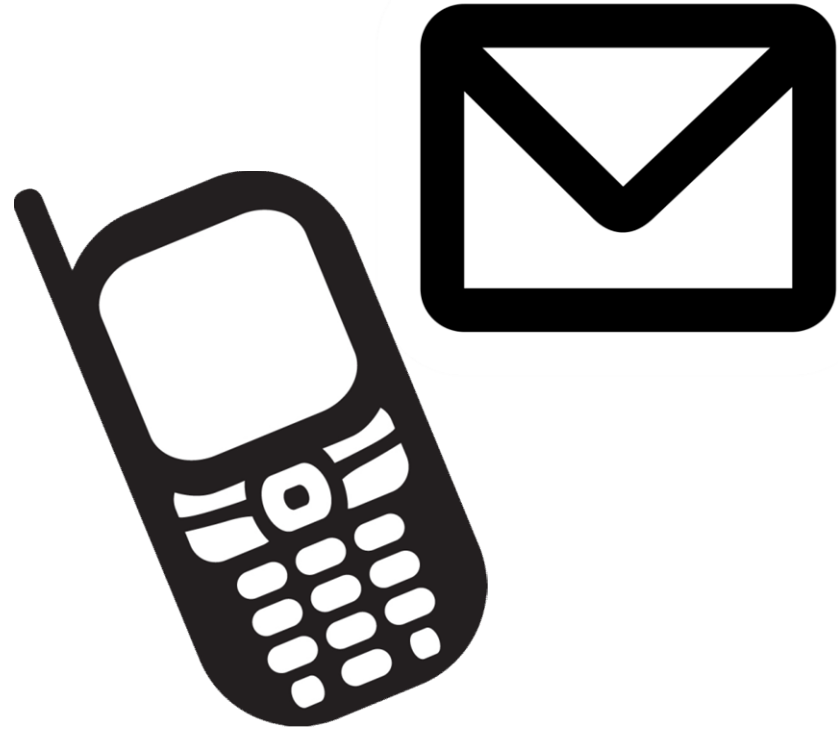
Name: _____ Grade: _____ DOB: _____ Case Manager: _____ BIP: <input type="checkbox"/> Yes <input type="checkbox"/> No Primary Eligibility: _____ Secondary Eligibility: _____  Accommodation/Modifications: <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">           &gt; _____            &gt; _____            &gt; _____            &gt; _____            &gt; _____         </div> <div style="width: 45%;">           &gt; _____            &gt; _____            &gt; _____            &gt; _____            &gt; _____         </div> </div> Notes: _____  Services Provided: <input type="checkbox"/> _____ Frequency: _____ Start date: _____ End Date: _____  <input type="checkbox"/> _____ Frequency: _____ Start date: _____ End Date: _____  <input type="checkbox"/> _____ Frequency: _____ Start date: _____ End Date: _____	Present Levels Reading: _____  Math: _____  Other: _____
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# Communication

- **Contact list**
- **Communication log**
- **Letters and emails to and from the school**
- **Business card holder**





# Evaluations

- Request and/or referral for evaluation
- Assessment plans / consent
- Results and recommendations
  - School assessments
  - Private assessments





# IEP/504 Plan Tab

- Copy of parent rights and safeguards
- **IEP/504 Plan**
- Prior written notice and meeting notes



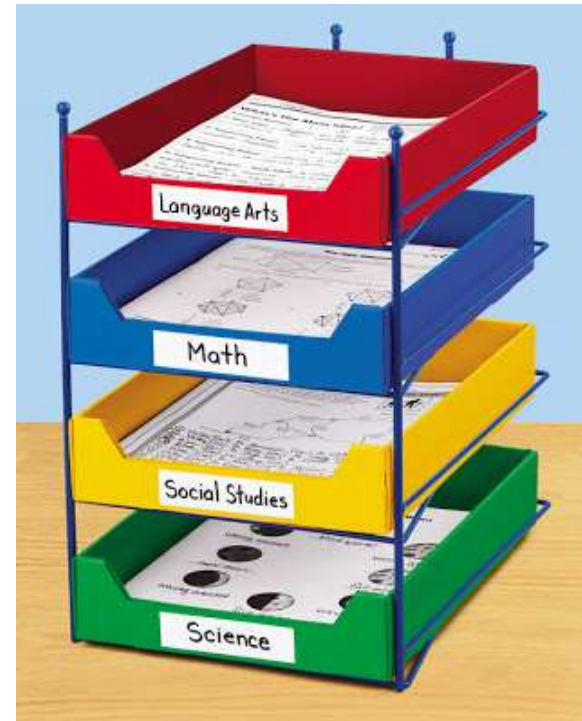
# Report Cards/Progress Notes

- **Report Cards**
- **Progress Reports**
- **Progress towards goals reports**



# Sample Work

- Sample of school work
- Standardized tests
- Graded tests
- Homework





# Behavior

- **BIP/BSP:**  
**Behavior Intervention**  
**or Support Plan**
- **Disciplinary notices**





# Optional Additional Tabs

- Identification card/Birth Certificate
- Medical card
- Insurance
- Regional Center information
- Other agencies
- Outside therapies
- Information on disability

# Pockets

- Free space to put documents that need filing
- School Calendar
- School handbook



# Purge

- Go through binder to review prior to meetings and update as needed.
- Move older documents to permanent storage (box, file cabinet) or create a new binder as needed.
- Err on the side of caution when deciding to discard anything



# Helpful Tips!

- Put most current records on top of each section
- Mark dates on documents lightly with pencil
- **Save originals** for making additional copies
- Make copies of all correspondence, forms, etc.





## More Helpful Tips!

- In order to document verbal conversations, follow up with an email/letter to all present
- Consider scanning all documents
- Hole punch carefully. Use sheet protectors when necessary.
- Clip large reports to hold together



## More Helpful Tips!

- Can run into organization issues – where to store certain documents.
- Make a plan and stick with it.
- Stick to organizing, do not stop and read all documents
- Keep blue ink pen to use for signatures





Office of Special Education Programs  
U.S. Department of Education

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The background of the entire slide is a close-up, slightly blurred image of many colorful paper clips in shades of blue, yellow, green, pink, and red. A white rectangular box with a thin blue border is centered in the upper half of the slide, containing the main text.

# **Thank you for coming!**

**Please fill out a workshop  
evaluation before you leave.**

**For more information about this or  
other free workshops we offer,  
please contact:**



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