

IEP documentation made clear: Facilitator guide (sample)

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Session at a glance

This is a 60-minute, facilitator-led session that teaches educators to document IEPs, service hours, and accommodations accurately. It pairs with the 19-slide deck and the participant learning guide.

Item	Detail
Audience	General education teachers, special education teachers, paraprofessionals, related service providers, and administrators
Length	60 minutes, plus an optional 30-day follow-up
Group size	12 to 30 participants, in tables or breakout groups of 3 or 4
Delivery	In person or live virtual (see adaptations)
Facilitator	LaShonda Roberts, MHA, M.Ed.
Materials	Slide deck, participant learning guide (printed or digital), job aids, pens, sticky notes or a poll tool, a timer, and a parking-lot chart

Learning objectives

1. Identify the required parts of an IEP and where each is documented.
2. Record service hours accurately, including missed sessions and make-ups.
3. Tell accommodations from modifications and document how they are used.
4. Use a checklist to review a sample record and decide what to fix first.

One week before

- ☐ Fill in the bracketed items on the slides and in the learning guide (local policy, links, contact details).
- ☐ Review the legal summary with your special education director.
- ☐ Send the learning guide and ask participants to bring one blank service log or IEP form.
- ☐ Print the job aids if you are meeting in person.

On the day

- ☐ Test the projector, sound, and slides 15 minutes early.
- ☐ Set up tables for groups of 3 or 4.
- ☐ Post a parking-lot chart for questions you will answer later.
- ☐ Confirm that every example you will use is fictional.

Run of show

The session runs 60 minutes in seven segments, and most of the time goes to practice. Use this table as your one-page agenda.

Clock	Min	Segment	Slides	You do	Participants do
0:00	7	Opening	1 to 3	Welcome, set ground rules, state objectives, run the poll	Answer the poll
0:07	9	Part 1: IEP essentials	4 to 5	Walk the five parts, then compare vague and clear entries	Rewrite a vague entry with a partner
0:16	11	Part 2: Service hours	6 to 7	Walk the log fields, teach Mark, Explain, Plan, Close	Solve the fire-drill problem
0:27	11	Part 3: Accommodations	8 to 9	Teach the one-question test, then the five habits	Label A or M, then rewrite one vague entry
0:38	7	Part 4: Legal and privacy	10 to 11	Summarize IDEA, FERPA, 504, and local rules, then do and don't	Name one privacy risk
0:45	10	Apply	12 to 14	Introduce the checklist, run the scenario, debrief	Work in groups on Jordan's records
0:55	5	Wrap-up	15 to 19	Run the knowledge check, reflection, and commitments	Rate confidence, commit to one action

Time checks: if you are more than 3 minutes behind at 0:27, shorten the privacy discussion and keep the scenario whole.

Note on the deck: some slide speaker notes list longer times than this table. Follow this table for the 60-minute version.

Facilitation notes: opening and Part 1

Opening (0:00 to 0:07, slides 1 to 3)

Purpose: build safety and show why records matter.

- **Say:** "Today's goal is simple: records that show what each student was promised, what was delivered, and what happened next."
- **Set ground rules:** all examples are fictional, no real student details, and mistakes are welcome here.
- **Poll (slide 3):** ask which record gets questioned most: service logs, accommodations, or progress notes. Write the tally on the parking-lot chart.
- **Watch for:** blame or defensiveness. Reframe: "Good records protect students and the staff who serve them."
- **Transition:** "Let's start with what an IEP must contain."

Part 1: IEP essentials (0:07 to 0:16, slides 4 to 5)

Purpose: help participants see the five core parts and recognize clear entries.

- **Slide 4 (4 min):** point to each card and ask, "Where does this live on your state form?" Name the limit: the federal list is longer, so show your state form.
- **Slide 5 (5 min):** reveal the vague entry first and ask, "What could an auditor not tell?" Then reveal the clear entry and name the pattern: measurable detail, amount or frequency, place, and date.
- **Try it (in the guide):** pairs rewrite "*Needs help with writing.*" Give 2 minutes. Cold-call two pairs.
- **Strong answer sounds like:** "Small-group writing support, 30 minutes, 2 times a week, in the resource room."
- **Watch for:** participants who write goals instead of entries. Redirect to what is documented, not what is hoped.
- **Transition:** "An IEP promises services, so let's see how we prove they happened."

Facilitation notes: Part 2, service hours (0:16 to 0:27, slides 6 to 7)

Purpose: participants can log services accurately and handle a missed session.

Slide 6, service log fields (6 min)

- **Say:** "A log is evidence. It must show what the student received, not what was scheduled."
- **Walk the fields:** date and time, duration, frequency, service and provider, location, and notes. Stress that duration means minutes served.
- **Use the sample entry:** point to each field in the Oct 14 example and ask where it would sit on participants' own logs.
- **Ask:** "Which field is most often missing on your campus?"
- **Say once, clearly:** your district may require more fields, so participants should follow the district log.

Slide 7, missed sessions (5 min)

- **Teach the four verbs:** Mark, Explain, Plan, Close. Have participants say them aloud.
- **Try it (in the guide):** a 30-minute session ends after 18 minutes because of a fire drill. Give 2 minutes.
- **Strong answer:** record 18 minutes served, note the fire drill, mark the 12 missed minutes, and plan a make-up if policy requires it.
- **Ask:** "Who tracks make-ups on your campus?" Capture the answers. If nobody knows, note it as a system gap.
- **Watch for:** participants who say they add entries later from memory. Reinforce recording at the time, and following district policy for any late entry.
- **Do not guess policy:** make-up and compensatory service rules vary. Say, "Here is where we check our district policy," and point to the bracket on the slide.
- **Transition:** "Services are one piece. Now the supports that make instruction accessible."

Facilitation notes: Part 3, accommodations (0:27 to 0:38, slides 8 to 9)

Purpose: participants can tell accommodations from modifications and write a clear accommodation entry.

Slide 8, accommodations versus modifications (5 min)

- **Teach one question:** "Does the learning target change?" If no, it is an accommodation. If yes, it is a modification.
- **Sort aloud:** an audio version of a text, an assignment with fewer concepts, a quiet room. Answers: accommodation, modification, accommodation.
- **Say:** modifications can affect grading, promotion, and state testing, so the IEP team decides them. Participants should never decide alone.
- **Watch for:** "shorter assignment" confusion. Ask whether the concepts changed or only the amount. Fewer concepts means the target changed.

Slide 9, recording an accommodation (6 min)

- **Compare:** read "Extra time as needed" and then the clear entry aloud. Ask, "Which one proves the support happened?"
- **Teach the five habits:** name it, match it to a need, say when and where, keep brief evidence, review at progress checks.
- **Try it (practice):** each participant rewrites one real vague entry from their own work in fictional terms. Give 2 minutes, then share one.
- **Reassure:** evidence can be a short note or a mark on the log. It does not have to be long.
- **Transition:** "These records live inside legal rules, so let's look at those."

Facilitation notes: Part 4 and Apply (0:38 to 0:55, slides 10 to 14)

Part 4: legal landscape and privacy (0:38 to 0:45, slides 10 to 11)

Purpose: give participants a clear, high-level frame without turning the session into a law lecture.

- **Slide 10 (3 min):** read the four rows. Say, "We are not lawyers. This is a summary, and local policy decides the details."
- **Be precise:** IDEA guarantees a free appropriate public education and the IEP documents how it is provided. FERPA protects education records and limits access. Section 504 provides access and accommodations when a disability limits a major life activity.
- **Slide 11 (4 min):** read the Do and Don't lists. Ask for one privacy risk from daily routines, such as printers or hallway talk, and one change to make this week.
- **Remind:** never put real student details into personal tools or AI tools.

- **Verify first:** have your special education director review the legal wording before the session.

Apply (0:45 to 0:55, slides 12 to 14)

Purpose: participants practice reviewing a record and deciding what to fix first.

Slide 12, checklist (2 min)

- Introduce the five-minute review and ask which item people skip most often.

Slide 13, the Jordan scenario (4 min)

- **Set up:** Jordan is a fictional grade 4 student with a reading IEP. Groups of 3 or 4 compare the IEP with the records in the scenario table.
- **Task:** decide what to fix first, second, and third, and write the reason.
- **Circulate:** listen for the service gap, accommodation evidence, and progress data.
- **Prompts if groups stall:** "What does the IEP promise?" "What can a reviewer see?" "Which gap affects the student most?"

Slide 14, model answer (4 min)

- **Debrief:** ask two groups to share their order and reasons.
- **Model answer:** first close the service gap, because missed services affect the student directly. Second, record accommodation use with dated notes. Third, add current progress data before the report is due.
- **Accept other orders** if the group justifies them with the IEP and policy.
- **Say:** if services fell short, tell the case manager promptly and follow your policy.

Facilitation notes: wrap-up and evaluation (0:55 to 1:00, slides 15 to 19)

Purpose: confirm learning, build confidence, and secure one concrete commitment from every participant.

Min	Slide	What you do
2	15 Knowledge check	Run as a quick poll. Answers: 1 B, 2 B, 3 A, 4 B, 5 B. Reteach any question under 80% correct.

Min	Slide	What you do
1	16 Checkpoint	Participants rate confidence from 1 to 5 and name one habit, one risk, and one support to request.
1	17 Job aids	Show the three tools and where to find them. Say to adapt them to district forms.
1	18 Make it stick	Each person picks one action before their next IEP meeting. Invite two volunteers to share.
0	19 Resources	Leave on screen during the survey. Share the survey link and your contact details.

Close: revisit the opening poll. Say, "These actions go straight at the records you said get questioned most."

Evaluation plan

Survey (at the end of the session)

1. How confident are you about documenting IEPs, service hours, and accommodations? (1 to 5, before and after)
2. Which part was most useful?
3. What is one change you will make in your documentation?
4. What is still unclear?
5. What support would help you most?

30-day follow-up

- Send a short check-in asking whether participants completed their action and what got in the way.
- Offer an optional record review using the checklist, with fictional or de-identified records only.
- Share the three most-requested supports with administrators.

Success measures: survey ratings rise from before to after, most participants name a specific action, and follow-up responses report completed actions.

Common misconceptions and questions to expect

Participants usually bring seven misconceptions, and each has a short, respectful response.

What you may hear	How to respond
"Scheduled minutes are enough."	A log shows what was delivered. Record minutes actually served.
"A blank just means nothing happened."	A blank looks like a missing service. Mark it, explain it, and plan any make-up.
"I'll add it later from memory."	Record at the time. For any late entry, follow your district's policy and label it as late.
"Any change I make is an accommodation."	Ask whether the learning target changed. If it did, it is a modification, and the IEP team decides.
"Accommodations only matter on tests."	Apply them wherever the IEP says they apply, including daily instruction.
"FERPA only covers paper records."	FERPA protects education records in any format, including electronic files and email.
"Make-ups are optional."	It depends on the IEP, the team, and your state and district policy. Verify before you answer.

Questions you may be asked

Question	Suggested response
Who decides on compensatory services?	The IEP team decides, following your state and district process. Refer to the case manager.
How long do we keep records?	It follows your state and district retention schedule. Check with your records office.
Can I keep notes on my personal phone?	Follow district policy. Avoid personal devices for student information unless it is approved.

Question	Suggested response
A parent asks to see the service log.	Parents generally have rights to review education records. Route the request through the case manager and your district procedure.

When you do not know an answer, write it on the parking-lot chart, say you will confirm it, and send answers within a week.

Adaptations, accessibility, and inclusion

The 60-minute plan flexes to other formats by changing where the practice time goes.

Version	What changes
Live virtual (60 min)	Use breakout rooms of 3 or 4 for the scenario. Run polls in the platform. Share the learning guide and job aids by link before the session. Ask for cameras optional and chat open.
Short version (45 min)	Assign Part 4 (legal and privacy) as pre-reading. Make the Try it activities demonstrations. Move the knowledge check to the follow-up email.
Extended version (90 min)	Add a second scenario. Let participants audit their own blank forms. Add a longer question-and-answer block and a break after Part 2.

Accessibility and inclusion

- Read every slide aloud and describe images, so participants who cannot see the screen are included.
- Send the learning guide in advance so participants can use screen readers or enlarge text.
- Allow written, spoken, or chat responses to every activity.
- Use captions in virtual sessions, and share the slides afterward.
- Do not rely on color alone: slides pair color with words.
- Offer a short break for sessions of 75 minutes or longer, and invite anyone to step out when needed.

- Keep discussions focused on practice, never on individual students or colleagues.

Confirm before you facilitate

This guide is general education, not legal advice, so confirm each item with your special education director before the session.

- ☐ Which sections appear on your state IEP form, and how they map to the five cards on slide 4
- ☐ Required fields on your district service log (slide 6)
- ☐ Your policy on make-up and compensatory services (slide 7)
- ☐ Timelines for progress reports and IEP meetings
- ☐ Legal wording on slide 10, reviewed by your director or counsel
- ☐ Rules for storing, sharing, and retaining records
- ☐ Your district technology and privacy policy, including rules on AI tools
- ☐ Who participants should contact with follow-up questions

Bracketed items still open in the deck and learning guide:

- Your email address
- The follow-up survey link
- Download links for the job aids
- District and state policy details

Sources to review: sites.ed.gov/idea and studentprivacy.ed.gov, plus your state education agency's special education guidance.

Facilitator notes
