

IEP documentation made clear: Participant learning guide

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About this guide

This guide helps you write IEP, service, and accommodation records that are accurate, complete, and ready for review. It goes with the live session and works on its own afterward.

Who it is for: general education teachers, special education teachers, paraprofessionals, related service providers, and administrators.

How to use it

- **Before the session:** skim the key terms and bring one blank service log or IEP form from your campus.
- **During the session:** complete each activity marked *Try it*. Write in the spaces provided.
- **After the session:** use the job aids and your action plan on your next IEP.

Ground rules: every student in this guide is fictional. Never write real student names or details here. Rules and timelines vary by state and district, so confirm local policy where you see a bracket or a note to verify.

Learning objectives and agenda

By the end of this 60-minute session, you will be able to:

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.

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Key terms

These plain-language definitions are used throughout the session.

Term	What it means
IEP	Individualized Education Program. The written plan for a student with a disability who qualifies for special education.
Present levels of performance	A description of how the student is doing now, supported by data.
Measurable annual goal	A goal that states what the student will do, how well, by when, and how progress will be measured.
Related services	Support such as speech therapy, counseling, or occupational therapy that helps a student benefit from special education.
Frequency	How often a service is delivered, such as 3 times a week.
Duration	How long each session lasts, in minutes.
Make-up session	A session delivered later to replace one that was missed, when policy or the team requires it.
Accommodation	A change to how a student learns or shows learning. The learning target stays the same.
Modification	A change to what a student is expected to learn or show.

Term	What it means
Progress monitoring	Collecting data regularly to see whether a student is moving toward the goals.
IDEA	Individuals with Disabilities Education Act. The federal special education law.
FAPE	Free appropriate public education. The right IDEA guarantees to eligible students.
FERPA	Family Educational Rights and Privacy Act. It protects student education records.
Section 504	A federal civil rights law that requires access and accommodations for students whose disability limits a major life activity.
Legitimate educational interest	A school official's need to see a record in order to do their job for the student.
Case manager	The staff member who coordinates a student's IEP.

Part 1: IEP essentials

A complete IEP answers five questions: where the student is, where the student is going, what help the student gets, what removes barriers, and how families hear about progress.

IEP part	Question it answers	What to document
Present levels of performance	Where is the student now?	Current data, strengths, and needs
Measurable annual goals	Where is the student going?	Skill, level, timeline, and how it will be measured
Special education services	What help will the student get?	Type, amount, frequency, location, start and end dates
Accommodations and supports	What removes barriers to learning?	The exact supports and where they apply
Progress reporting plan	How will families hear about progress?	How and when updates are shared

Federal law lists more required items, such as participation with nondisabled peers, assessment accommodations, and transition services (see 34 CFR 300.320). Compare this table with your state IEP form.

Vague versus clear

Clear entries include a measurable detail, an amount or frequency, a place, and a date. All examples are fictional.

Vague entry	Clear entry
Jordan struggles with reading.	On the fall probe, Jordan read 42 words per minute at 88% accuracy on a grade 3 passage.
Gets extra help as needed.	Small-group reading support, 30 minutes, 3 times a week, in the resource room.
Progress is good.	Met 3 of 4 probe targets since September. Next data point: [date].

Try it

Rewrite this vague entry so an auditor could verify it: *"Needs help with writing."*

Your rewrite: _____

Part 2: Service hours

A service log shows what a student actually received, so record minutes served, not minutes scheduled.

Field	What to record
Date and time	Day delivered, start and end time
Duration	Minutes actually served
Frequency	The rate in the IEP, such as 3 times weekly
Service and provider	What was delivered, and by whom
Location and setting	Where, and individual or group
Notes	Attendance, student response, and changes

Confirm required fields against your district log. Your district may also require initials, group size, or delivery method.

Sample entry (fictional student)

Date and time	Duration	Service	Location	Provider	Notes
Oct 14, 9:05 to 9:35	30 minutes	Reading support, small group	Resource room	[name]	Present, used graphic organizer

When a session is missed or cut short

The most common gap is a blank where a missed session should be. Follow four steps:

1. **Mark** any missed or shortened time.
2. **Explain** the specific reason, such as a school assembly or student absence.
3. **Plan** the make-up, if your policy or the team requires one.
4. **Close** the record by logging completion or the team's decision.

Make-up rules vary by state and district: [insert local policy].

Try it

A 30-minute session ended after 18 minutes because of a fire drill. What do you record?

Your answer: _____

Part 3: Accommodations and modifications

Ask one question: does the learning target change? If it stays the same, the support is an accommodation. If it changes, it is a modification.

	Accommodation	Modification
What changes	How a student learns or shows learning	What a student is expected to learn or show
Learning target	Stays the same	Changes
Examples	Extra time, quiet setting, audio text	Fewer concepts, reduced depth, different grading basis

Modifications can affect grading, promotion, and state testing. If you are unsure which one applies, ask the IEP team before you record it.

How to record an accommodation

Every entry should do five things:

1. Name the exact support.
2. Match it to a student need.
3. State when and where it is used.
4. Keep brief evidence of use.
5. Review it at progress checks.

Vague	Clear
Extra time as needed.	Extended time (1.5 times) on written tests, resource room. Used on the Oct 8 unit test: student used 12 extra minutes.

Try it

Label each example with **A** (accommodation) or **M** (modification).

- An audio version of a reading passage: ____
- An assignment with fewer concepts than the class assignment: ____
- A quiet room for a test: ____

Part 4: Legal landscape and privacy

Four sets of rules shape your records: IDEA, FERPA, Section 504, and your state and district requirements.

Law or rule	What it means for your records
IDEA	Guarantees a free appropriate public education. The IEP documents how it is provided.
FERPA	Protects student education records and limits who may see them.
Section 504	Provides access and accommodations when a disability limits a major life activity.
State and district rules	Add forms, timelines, and local steps: [insert state and district].

This is a summary, not legal advice. Verify details with district and state policy.

Privacy do and don't

Do

- Share records only with staff who have a legitimate educational interest.
- Use secure, district-approved systems.
- Lock screens and keep paper records in locked files.

Don't

- Email student details to personal accounts.
- Leave documents on printers or desks.
- Discuss students where others can overhear.
- Put real student details into personal tools or AI tools.

Try it

Name one privacy risk in your daily routine and one change you can make this week.

Risk: _____ Change: _____

Scenario practice: Jordan's records

Jordan is a fictional grade 4 student with a reading IEP, and the records do not match the plan in three places. Work with your group for about 4 minutes.

The checklist: use the five-minute review in the job aids. Compare the IEP with the records, then decide what to fix first.

The IEP says	The records show	What I would do
Reading support: 30 minutes, 3 times a week	2 sessions logged this week. Friday is blank.	
Accommodations: extended time and text-to-speech	Unit test given. No note on time or tools.	
Progress report due: [date]	Latest data point is from September.	

Our group's first fix, and why:

Our second and third fixes:

Knowledge check

Circle one answer for each question. The answer key follows.

- 1. Which field shows how long a session lasted?
 - o A. Frequency
 - o B. Duration
 - o C. Location
- 2. A session was missed. What is the best next step?
 - o A. Leave it blank

- B. Mark it, explain it, and plan a make-up if required
- C. Delete the entry

3. Extra time on a test is a(n):

- A. Accommodation
- B. Modification

4. Which law limits who may see student records?

- A. IDEA
- B. FERPA
- C. Section 504

5. A strong accommodation entry includes:

- A. The grade level only
- B. The exact support, when and where it was used, and brief evidence
- C. A general comment

Answer key

Item	Answer	Why
Question 1	B	Duration is the minutes actually served. Frequency is how often.
Question 2	B	Missed time is marked, explained, and made up when policy or the team requires it.
Question 3	A	The learning target stays the same, so it is an accommodation.
Question 4	B	FERPA protects education records and limits access.
Question 5	B	A clear entry names the support, where and when it was used, and evidence.
Try it, Part 1	Sample	Small-group writing support, 30 minutes, 2 times a week, in the resource room. Goal: write a 5-sentence paragraph with 80% accuracy by [date].
Try it, Part 2	Sample	Record 18 minutes served. Note the fire drill as the reason. Mark the 12 missed minutes. Plan a make-up if policy requires.

Item	Answer	Why
Try it, Part 3	A, M, A	Audio text is an accommodation. Fewer concepts is a modification. A quiet room is an accommodation.
Scenario	Sample order	1. Close the service gap (mark and explain Friday, plan a make-up). 2. Record accommodation use with dated notes. 3. Add current progress data and tell the case manager if services fell short. Other orders are acceptable if justified with the IEP and policy.

Reflection and action plan

Rate your confidence on each skill from 1 (not yet) to 5 (ready to coach others), then commit to specific actions.

Skill	Before the session	After the session
Documenting IEP components		
Logging service hours and make-ups		
Recording accommodations		
Protecting student privacy		

Write down:

- One habit to keep: _____
- One documentation risk to fix: _____
- One support to request (template, coaching, or time): _____

Before my next IEP meeting

- ☐ Use the 5-minute checklist on one record.
- ☐ Close one open make-up session.
- ☐ Add one piece of progress evidence.

My action	By when	Support I need

Job aids

Three tools turn this session into daily habits. Adapt each one to your district forms rather than replacing them.

1. IEP documentation checklist

Use this five-minute review before any IEP meeting.

- ☐ IEP sections are complete and dated
- ☐ Service log matches the IEP
- ☐ Missed sessions are explained and planned
- ☐ Accommodations are used and recorded
- ☐ Progress evidence is attached
- ☐ Signatures and notices are in place
- ☐ Privacy checked before sharing

2. Service log template

Date	Start and end time	Duration (minutes)	Service	Provider	Location	Make-up status	Notes

3. Accommodation tracker

Accommodation	Student need	Where and when used	Evidence	Review date

Resources and items to verify

This guide is general education, not legal advice, so confirm every local detail before you rely on it.

Where to learn more

- IDEA: sites.ed.gov/idea (U.S. Department of Education)
- FERPA: studentprivacy.ed.gov (U.S. Department of Education)
- Section 504: ed.gov, Office for Civil Rights
- District special education handbook: [\[link\]](#)
- State IEP guidance: [\[link\]](#)

Confirm with your special education director

- ☐ Which sections appear on your state IEP form
- ☐ Required fields on your district service log
- ☐ Your policy on make-up and compensatory services
- ☐ Timelines for progress reports and meetings
- ☐ Rules for storing, sharing, and retaining records
- ☐ Your district technology and privacy policy

Questions and feedback: LaShonda Roberts, MHA, M.Ed., [\[email\]](#). Survey: [\[insert link\]](#)

My notes
