

Annual Review Checklist for IEP Teams

Student Name: _____

Date of Review: _____ IEP Case Manager: _____

Preparation

- Review previous IEP and progress toward goals.
- Gather updated assessment data and reports.
- Collect input from teachers, service providers, and parents/guardians.
- Send meeting invitation to all required IEP team members.

IEP Meeting Items

- Review and discuss present levels of academic achievement and functional performance.
- Identify strengths and areas of need.
- Discuss progress on previous goals and objectives.
- Develop new measurable annual goals and, if needed, short-term objectives.
- Determine necessary accommodations, modifications, and supports.
- Review and specify related services (e.g., OT, PT, Speech, Counseling).
- Consider participation in state and district assessments.
- Discuss and decide placement in the least restrictive environment (LRE).
- Address transition planning requirements (age 14+ or as needed).

Post-Meeting Follow-Up

- Distribute finalized IEP document to parents/guardians and all service providers.
- Update student records and ensure IEP implementation.
- Schedule progress monitoring and next review date.

Date Distributed: _____

Next Annual Review Due: _____