

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: _____